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Pellicoli's Overnight Success Was 25 Years In The Making

By DOM SERAFINI

Pellicoli who? What about Spain's Antena 3, France's Marathon, Italy's Magnolia and the U.K.'s Zodiak TV? That's who! But let's make the proper introduction. The 58-year old Lorenzo (Renzo) Pellicoli is CEO of the Novara, Italy-based De Agostini Holdings, a 108-year old privately held multi-billion dollar financial conglomerate.

De Agostini Holdings controls some 40 TV and film companies in 14 countries, including India and Russia, through its own subsidiary, the Milan, Italy-based De Agostini Communications, whose CEO is Paolo Ceretti. Today, De Agostini



Lorenzo Pellicoli, CEO, De Agostini Holdings and CEO, Zodiak Entertainment

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Laughter Is Back Big To Console Audiences

By ERIN SOMERS

According to the old proverb, laughter is the best medicine for all kinds of malaise, including a remedy for television woes. And, in today's turbulent economic climate, this adage may prove to be truer than ever. Plus, with movie tickets in cities all over the globe hitting all time highs (roughly \$20 each in London, \$13 in New York, \$10.50 in Paris), TV is beginning to look like the best bargain for audiences in need of a little escape.

VideoAge spoke to a host of TV professionals who specialize in hilarity to find out how the recession has affected comedy programming, which types of shows are tickling funny bones around the world and whether the comedy drought that North America has experienced in the past decade was due to a drying up of creativity or the fact that then-rich people preferred to shed tears with drama.

With popular series like *30 Rock*, *The Office*, and *My Name is Earl* on its

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The Mystery of AGICOA. Europe's Best Open Secret

Lately its presence is felt everywhere — here at MIP, at last year's MIPCOM and at AFM 2008 — but it is nowhere to be seen. We can view their print advertising, but the ads have no contact info. They're not listed in market guides. Their company's acronym is a mystery. In Santa Monica, California, during the AFM, market organizers had to sift through a slew of registrant printouts to track down one of their representatives.

The company is called AGICOA and it is appropriately based in Geneva, in the heart of banking-secretive Switzerland. From

what one can get off of its official website, AGICOA is a not-for-profit organization established in the early '80s to track and distribute (minus 10 percent commission) royalties on retransmission

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L.A. Screenings '09: Last But Not Least They're Back

U.S. TV network execs have finally gotten the need to try and do away with the pilot process out of their systems and for the 2009-2010 season, are humbly going back to the future. But not without trying some other forms of change, which, this year, are manifested in a late upfront schedule that will result in a later-

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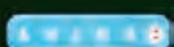
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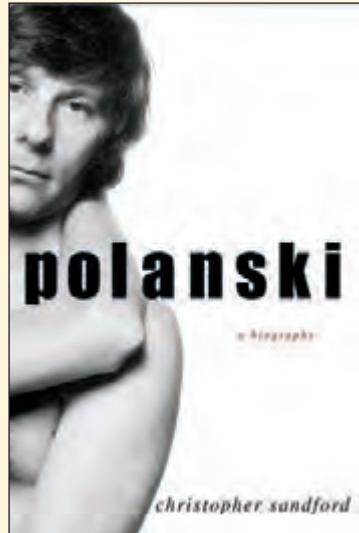
At Italy's De Agostini Group, Lorenzo Pellicioli's overnight success only took 25 years

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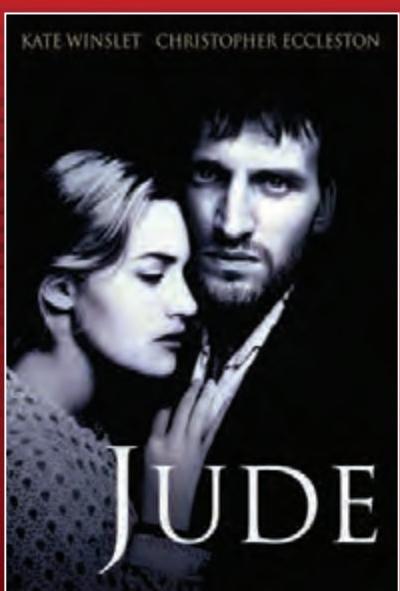
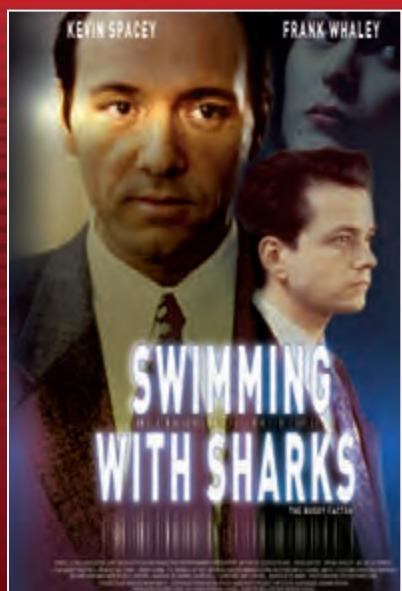
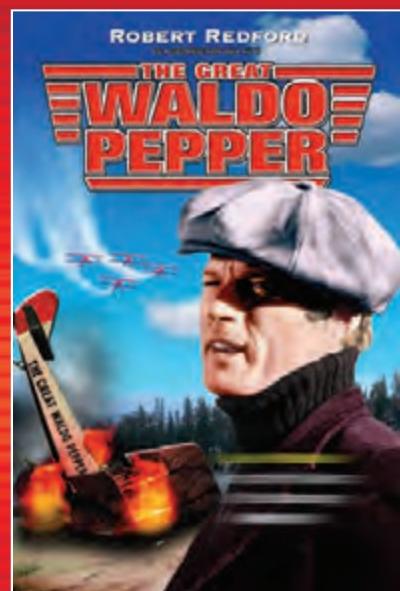
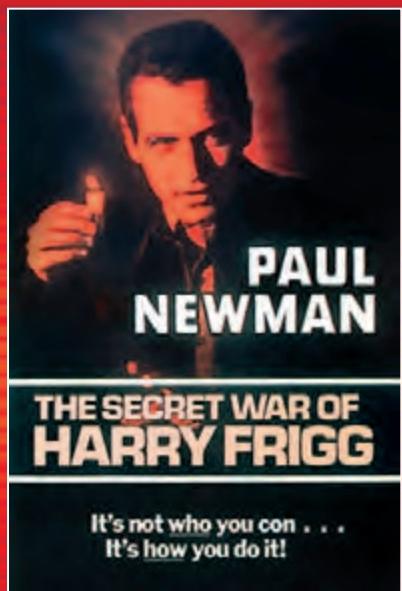
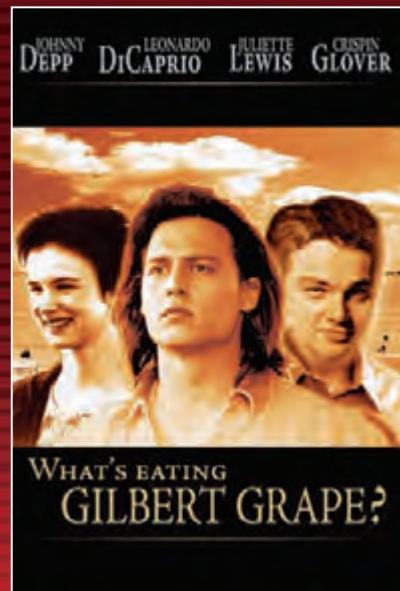
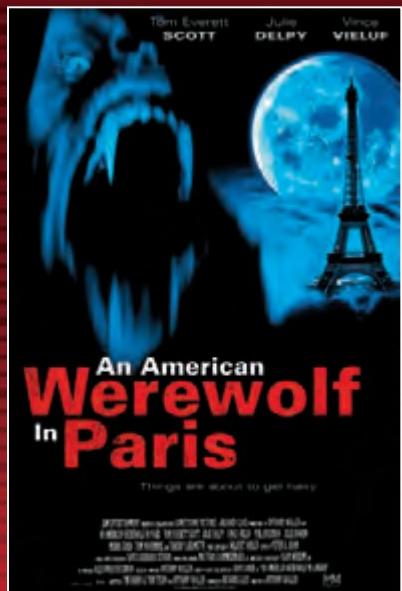
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SABC Bill Passes Muster

In view of the upcoming football World Cup to be held in South Africa, the country is getting more attention than usual — its television sector in particular — with the South African Broadcasting Corporation (SABC) at the forefront. In the news recently was the appointment of Peter Kwele, who

formerly served as SABC's general manager for Strategic Marketing and Communications, as the broadcaster's new head of its 2010 project unit. In this new role, Kwele will focus on SABC's delivery of the 2010 FIFA World Cup.

Also in the news in late February was South Africa's National Assembly, which approved a revised version of the Broadcasting Amendment Bill and returned it to President Kgalema Motlanthe for signature. The bill, which

called for the sacking of the entire SABC board, had been returned to Parliament earlier this year after President Motlanthe expressed concerns about its constitutionality and refused to sign it.

Despite the changes made, the legislation was still opposed by the Democratic Alliance (DA), the Inkatha Freedom Party, the Freedom Front Plus, the African Christian Democratic Party and the Independent Democrats.

A DA spokesperson said that the bill had now been amended to make a proper enquiry mandatory before SABC board members could be summarily dismissed. Regardless, DA still opposed the bill because "the proposition that an entire board can be evicted is destructive of the security of tenure without which an independent board cannot protect the

journalistic freedom of its editorial staff."

Ismail Vadi, chairman of the Communications Committee (which drafted the bill), defended the revised bill, noting that it was unreasonable to allow the firing of a single member of the board, but not the whole board if it became dysfunctional.

PeaceArch To Find its Peace

Canadian film and TV company PeaceArch Entertainment is still looking to find its new path. Even though its future has not yet been disclosed, speculation says that it is to be split up — some assets kept and others either shut down or sold.

It is hoped, however, that some entity of PeaceArch will continue to weather the storm and survive. In any case, PeaceArch North American Home Entertainment (a joint venture with ContentFilm) and the Canadian TV divisions are said to be doing well.

U.K.'s ITV In Merger Mood

The U.K.'s ITV network announced that in the past few months it has considered mergers with other companies, including U.K.'s Channel 4 and RTL's U.K.-based Five. The confession came in response to the impending release of Lord Carter's Digital Britain review, an annual government report on the performance of media companies, in which ITV's figures are expected to be weak. Representatives from ITV said that they contemplated the mergers at the urgings of Digital Britain, which encouraged participating companies to brainstorm radical business ideas.

Despite the announcement, ITV executives made it clear that the merger idea had not been discussed by the board, and would likely violate the Communications Act of 2003, which addresses competition and monopoly law. Nevertheless, the firm's 2008 revenues are expected to be markedly down. ITV has said that for the time being, it plans to tackle its profit margin by cutting costs, beginning with a reduction of mid-level executives. Reps from Five have also made comments favoring a merger.

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Raider Swoops In on Lionsgate

In 2005, Icahn Affiliates investor Carl Icahn, better known as a corporate raider, used his stake in Time Warner to try and force changes at the media company, which owns Warner Brothers, among other media properties. Now, Icahn is turning his attention to Lionsgate, the Santa Monica,

California and Vancouver, Canada-based independent film studio.

Icahn has nearly doubled his holdings to 14.28 percent since last September, and has expressed interest in adding nominees to the company's board.

This is a typical Icahn move. At Yahoo, he secured board representation and tried to push the company into accepting a takeover bid from Microsoft because he felt the firm wasn't maximizing shareholder value. Microsoft eventually withdrew its bid, but Icahn has remained on the Yahoo board.

But the Lionsgate affair is different. He has been a shareholder in the company for four years and is reported to be on good terms with senior management, including Jon Feltheimer, chief executive, and Michael Burns, vice chairman.

Icahn Affiliates has said that it was

raising its stake because Lionsgate's shares were "undervalued." It also said its plans "may include expanding the size of the board... and/or removing individuals from the board." This may prove to be tough for Icahn. Although Lionsgate is based in Santa Monica, the company is domiciled in Vancouver, Canada, meaning that at least half of its directors must be Canadian. Additionally, Lionsgate's shares have halved over the last year due to recessionary fears.

But Icahn's interest in Lionsgate comes as the firm is gearing up for a new phase. It is nearing completion of a large investment in a new TV channel, having agreed to pay U.S.\$225 million for the TV Guide Network, and is also launching Epix, a new premium cable channel, with MGM and Paramount Pictures.

Israeli TV Show Miffs Vatican

The Vatican has come out against what it's calling a "blasphemous" satire of Christianity on an Israeli TV network. The late-night program, which aired in February, included suggestions that Mary was impregnated by a school friend at age 15 and that Jesus died young because he was fat.

The Israeli foreign ministry has said the segment won't broadcast again, and the show's host, Lior Shlein, has apologized.

In the show, Shlein denied a slew of Christianity's basic tenets — including that Mary was a virgin and that Jesus walked on water — and said that he was doing so in order to teach a lesson to those Christians that deny the Holocaust. This remark was a reference to the Vatican's recent decision to lift the excommunication of Richard Williamson, a British-born Argentinean bishop who denied that six million Jews were killed during World War II.

According to the Vatican press office, its representative in Israel complained to the government about the program, which aired on private Channel 10.

In the show, it was said that Jesus couldn't have walked on water because "he was so fat he was ashamed to leave the house, let alone go to the Sea of Galilee with a bathing suit."

Letters

We just received the latest edition of *VideoAge* and in an effort to be "green," we'd like to request to no longer receive the hard copies of *VideoAge*. Pauline [Bohm] wants to assure you that she reads it online, therefore it's not necessary to receive a hard copy. In respect to the editions that we advertise in, Pauline will pick up hard copies when she is at the markets.

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Marketing Coordinator
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The Village Voice, February 4, 2009

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Even Stranger Than His Films: The Life of Roman Polanski

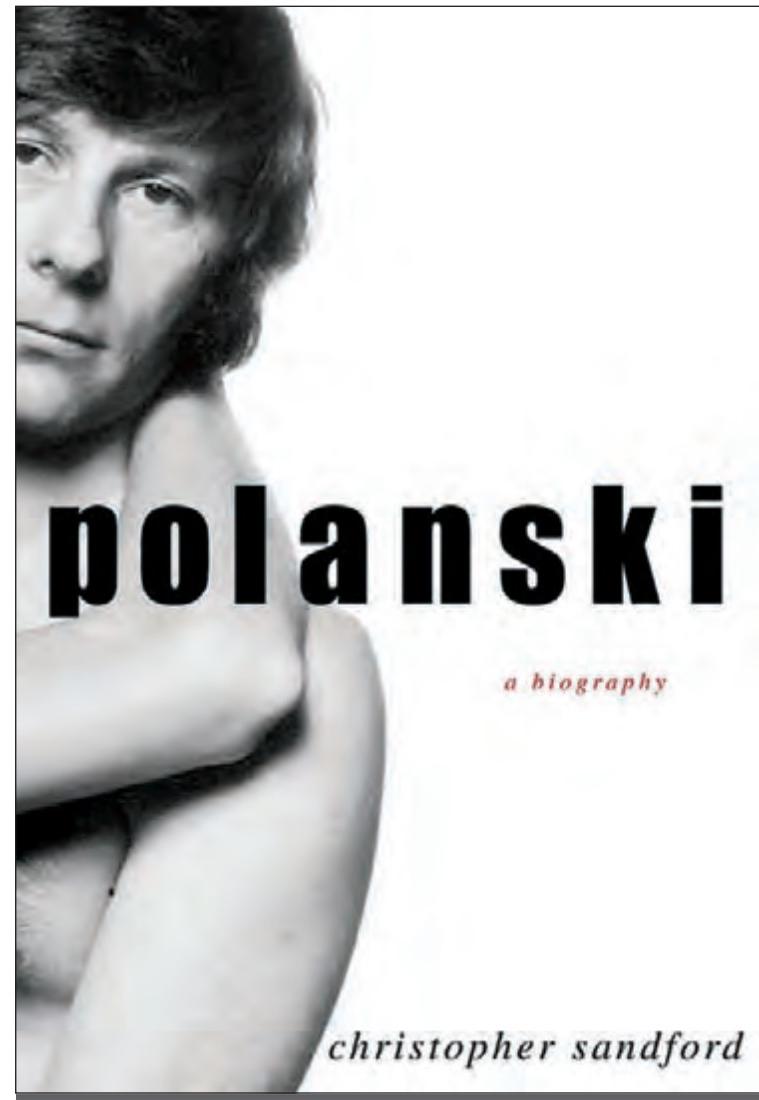
If Roman Polanski's life were a film, it would certainly be a drama, but it's difficult to determine what kind of drama. Encompassing elements of Holocaust tragedy, macabre horror flick and engrossing courtroom battle, the life story of the Polish director has been, as a recent biography puts it, "even stranger than fiction."

Polanski: A Biography by Christopher Sanford (2008, Palgrave Macmillan, 387 pages, U.S.\$29.95) takes a look at the life and work of one of the world's most tortured auteurs. Although the biography is unauthorized, Sanford, a British film and music reviewer who has also written biographies of Kurt Cobain, Eric Clapton, David Bowie and many others, brings a thoughtful and well-informed point of view to the career of a man who, at various points over the past 40 years, was a household name around the world.

Polanski's prowess as a director is undeniable. One only has to look at his filmography — *Rosemary's Baby*, *Chinatown* and Oscar-winning *The Pianist* to name a few — to realize that he is one of Hollywood's greatest talents. Unfortunately, he has spent his life in the spotlight more for his tabloid-worthy personal life than for his achievements in film. However, as it is often impossible to divorce a man's life from his work, it must be noted that in addition to landing him on the cover of the *National Enquirer*, Polanski's encounters with massacre on a grand scale and his struggles with personal demons may have also done much to shape his unique, markedly dark perspective.

Three events stand out as turning points in the director's life: his experience during the German occupation of Poland, the brutal murder of his wife Sharon Tate by the Manson Family and the charges levied against him for the statutory rape of a 13-year-old girl. Traces of these incidents have a way of popping up in Polanski's movies, whether it be in the general mood of a piece, or scenes pulled directly from his memory, which Sanford refers to as "biographical detritus."

Polanski was born Rajmund Roman Thierry Polanski on August 18, 1933 in Paris. His parents, Polish émigrés to France, made the dire misstep of



moving their young family back to Krakow on the verge of Hitler's ascendance. For the next 12 years, Polanski and his family watched Krakow deteriorate as they were shuffled from one ghetto slum to the next. As Sanford points out, Polanski would mine the visual and emotional landscape of those horrific years for material 63 years later in his Holocaust drama *The Pianist*.

The director's interest in film dates back to his childhood in the Jewish ghettos of Krakow, where as Sanford puts it, "he would often pass himself off as a German in order to buy a cheap ticket to the cinema." That young Polanski would risk his life to go to the movies is indicative of the almost obsessive affinity he felt for the medium, even at a young age.

In 1943, as 10-year-old Polanski looked on, his mother was rounded up by the SS and shipped off to Auschwitz

on the outskirts of Krakow. His father met the same fate nine days later. Remarkably, the Polanskis were able to save their son by sending him to board with a family of Catholics in a nearby village and changing his name several times (which is how he ended up with the altered name).

Sanford theorizes throughout the book that Polanski's traumatic upbringing greatly influenced the tone of his later movies. He points to the "sense of exile" cultivated in Polanski's youth as well as a fixation on death and the view that human beings are essentially cruel as the fallout of his years spent living side by side with atrocity.

The most interesting part of the book is the discussion of Sharon Tate's murder in the summer of 1969. Shortly after Polanski had his first mainstream success with *Rosemary's Baby*, a very pregnant Tate was killed in the couple's secluded home in the Hollywood Hills.

While Polanski was in London working on a film, four followers of Charles Manson, known as the Manson Family cult, broke into the house and killed everyone on the premises.

The massacre was random, baffling and mind-blowingly gruesome, and the media circus that followed only made things worse for the stricken director. According to Sanford, it prompted reporters to "openly speculate about the Polanskis' home life, where a wide knowledge of drugs, black magic and unorthodox sexual practices was thought to have somehow contributed to the tragedy."

Where Polanski's work is concerned, the effect Tate's murder had on her husband is all too apparent. Polanski himself has described Tate's death as "his worst and most prolonged blow," and his resulting anger and despair is apparent in even his most recent work.

By 1978, Polanski had retreated from the lurid spotlight of the tabloid media and experienced success with films like *Chinatown* and *The Tenant*. He had also finally begun to shake the erroneous reputation for being involved with Satanists and drug addicts that was one of the after-effects of the Tate massacre. Just when he was beginning to get back in the public's good graces, the director, who had a life-long appetite for the company of young women, was involved in an ambiguous affair that led to arrest, accusations of rape and a subsequent trial.

The circumstances, though a bit unclear to this day, revolved around Polanski's conduct with a 13-year-old girl. Needless to say, the media went nuts, and put Polanski, who loathed the negative attention, back on the news and in the tabloids. On the eve of the trial, at which Polanski was to plead guilty to unlawful sexual intercourse with a minor, he fled to France, where he remains.

Since the episode, Polanski's work has slowed down considerably, the notable exception being the aforementioned *The Pianist* and the media coverage, which he so reviled, has all but disappeared. However, in recent months Polanski has been back in the news, as a result of an HBO documentary. The doc, titled *Roman Polanski: Wanted and Desired*, premiered at Sundance in 2008, and hit living rooms later in the year. The focus of the film was the 1978 trial that led to the director's self-exile.

What has forced Polanski back into the spotlight is that the film presents new testimony from witnesses that could potentially clear the director's name. Just when it seemed that Polanski had disappeared into obscurity, he is back at the center of a scandal.

Polanski's cross to bear, through all his personal misfortune, was the attention he got from the media. His life has been comprised of a string of events so outlandish, that they are at times difficult to believe. On the set of one of his early movies, Polanski was quoted as saying "the more fantastic you are, the more real you become." As Sanford points out, "it was a quip that seemed to apply as much to Polanski himself as his work." **ES**

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The Good With Some Bad Made For a Not-Too-Bad TV Market

The very first television market of 2009 kicked off with an expectedly subdued NATPE in late January in Las Vegas, ushering in what many industry insiders are speculating will be a quieter than usual year in the entertainment biz. "Everyone here seems to be looking for a new gig," commented one distributor. "We could even call it NATPE 'giganomics.'"

But although the Sin City event was calmer than in years past — what with it coming in the midst of a worldwide economic crisis and under the still looming threat of a Screen Actors Guild strike — that doesn't mean it didn't have its bright spots.

The three-day NATPE event ended on January 29 and was held at both the Mandalay Bay Resort, for the booth-based exhibitors, and at the adjacent THEhotel, where suite-based distribution companies held court.

One of the hot topics at NATPE was the fact that following the market's 2010 event, its contract will expire with the Mandalay Bay, leaving many to speculate as to where the conference will move.

"There are just too many compelling reasons to stay in Las Vegas, even if it's not at the Mandalay Bay," said NATPE president and CEO Rick Feldman, speaking to *VideoAge* just days after the market. Yet despite his desire to remain in Nevada, the decision is still very much up in the air, he said, noting that he expects a final decision to be made after MIP-TV.

As such, *VideoAge* took an informal poll of NATPE attendees to see what new venues they were hoping for. This is keeping in mind that nowadays NATPE is not even a blip in Las Vegas. Indeed, the city's official visitors' bureau did not even list NATPE among its January 2009 conventions on its website (www.visitlasvegas.com).

"My personal first choice — and the most convenient for Latin buyers — would be Miami, with Los Angeles a



Disney Media Networks Latin America's Leonardo Aranguibel, Henri Ringel and Fernando Barbosa

close second," said Pedro Felix Leda of Argentina's Ledafilms. Leda also stressed that he'd prefer a hotel suite environment to a convention floor booth option.

Dorothy Crompton of Los Angeles-based Rive Gauche concurred, saying she'd like to see NATPE move to Miami "for a bigger focus on the participants from Latin America. Plus, this is more convenient for buyers traveling from Europe."

Other execs, including Leyla Formoso of Toronto-based Nelvana and Bruce Rabinowitz, a New York-based Sales executive for RAI Trade, would also like to see the market move to the more Latin-friendly Miami locale. But there were other suggestions. Beatrice Grossmann Conforti of Switzerland's RTSI said she'd prefer Los Angeles, San Francisco or Miami, while Susan Bender of New York's Bender Media Services was one of the few who would like to see the market remain in Las Vegas since, as she said, the locale "does generate a feeling of excitement."

It's not just the venue that's causing a split between attendees at the moment. Many execs were once again fed up with the divide between hotel suite and convention floor exhibition. NATPE prez Feldman spoke to that issue: "I know not everybody likes having both the suites and the floor, but it just may

be the best combination. There are those who like the suites. And there are some who like being on the floor. Plus, if everyone is in suites, the elevator problem could get worse."

On this subject, however, there are compelling reports that next year NATPE will most likely be an all-suite event, even though *VideoAge* couldn't get Feldman to unbutton on this topic. In order to make the stand concept continue to fly, Feldman needs the commitment of the big distribution companies who were on the floor and who, at press time, were unwilling to commit.



RTSI's Beatrice Grossmann Conforti paid a visit to VideoAge's stand

In a piece written for *VideoAge's* Daily at NATPE, in which Feldman responded to an editorial which stated that the market has become an international affair, he wrote: "I disagree that NATPE is exclusively an international market. It is true that domestic has been slow of late, but there are legislative, contractual, and technological changes on the horizon that could bring it back and we will be there to reflect those opportunities."

While Feldman doesn't believe that the market is now solely an international event, others see it as mostly a Latin American market. And not one that's all that easy to break into. Mathieu Bejot of TV France International (TVFI) opted to skip out on NATPE this year since "the Latin American buyers might in fact be at NATPE, but they're not there to see Europeans." Carol Sinclair of U.K.-based Eaton Films also opted out of NATPE, noting that the Lat Am region "is pretty impenetrable because they make a lot of their own programs and try to sell them amongst each other."

Although that may in fact be the case, the Latins are still big business in the U.S. since Hispanics now make up over 14 percent of the U.S. population. With such a large number of Spanish speakers

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Algeria's Gherbi Hacene of 3DTV Game Show at VideoAge's NATPE breakfast meeting

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NATPE [Continued]

(Continued from Page 14)



E1 Entertainment's Taste Buds with Lisa Wookey

in the country, it's no wonder that TV outlets that cater to the nation's Hispanic demographic continue to expand each day. Such companies were well represented at NATPE. One such firm is Burbank, California-based Liberman Broadcasting Inc. (LBI), which has been growing along with its market. Lenard Liberman, evp of LBI, told *VideoAge* that his company now reaches about 40 percent of the Hispanic market, and aims to achieve 65 or 70 percent penetration by the end of this year. On the pay-TV side, Alterna'TV is one of many subscription-based networks cropping up. Though the company's headquarters are in Mexico City, it is committed to bringing pan-Hispanic programming to its customers in the U.S. Leonardo Alvarado, the firm's director, described his company's goal thus: "The basis of the business is to reach vertical markets, like Mexicans living within the U.S." In

order to do so, he and his team have focused on special interest channels.

Latin America may be the best-represented region at NATPE, but talk still turned often to Berlin and Africa—sites of two markets held in February. Just one week after the doors of the Mandalay Bay convention center swung shut on NATPE '09, the 59th annual Berlin International Film Festival (also known as the Berlinale) kicked off. From February 5-15, Berlinale and its affiliate, the European Film Market (EFM), saw a slew of entertainment industry bigwigs looking for the next big movie.

Ken Dubow, president of Worldwide Distribution for Santa Monica, California-based PorchLight, explained that PorchLight attends both NATPE and the Berlinale in order to focus on buyers from different regions. "At NATPE, we're focused on U.S. and Latin

buyers," he said. "We don't see as many Europeans or Asians there anymore, so we focus our product on what's available in the Western hemisphere." He remarked that for his company, the EFM has surpassed NATPE in terms of relevance. "NATPE's relevance has diminished with its inability to attract global buyers to Vegas," he said.

For Racquel Mesina, director of International Sales for Toronto's Cinemavault, the two markets have very different focal points. "The focus of Berlin is towards the theatrical and home entertainment markets, in contrast to NATPE attendees who are primarily seeking television product."

At *VideoAge*'s annual NATPE breakfast, the topic du jour was the inaugural DISCOP Africa, which was held February 25-27 in Dakar, Senegal.

countries. And though numbers were unavailable, *VideoAge* estimated that some 3,000 people participated this year. According to Feldman, 7,500 people attended NATPE 2008.

The market boasted 57 seminars — 10 of which were actually deemed worthwhile by *VideoAge*. That's a scant 18 percent, but it's much better than the previous year's NATPE when there were 61 seminars and only nine, or 15 percent, were considered important. Of these significant seminars, three of the best attended were a keynote offered by Lionsgate CEO and co-chairman Jon Feltheimer, and Q & As with Anne Sweeney, co-chair of Disney Media Networks and president of the Disney-ABC Television Group, and Ben Silverman, the rookie co-chairman of NBC Entertainment and Universal Media Studios.

All three spoke about why, despite increasingly dire predictions, none believes that television is on its deathbed. Feltheimer called the entertainment industry "vibrant and ripe" for opportunity. "Everywhere you



Lightworks' David Nunez, David Dreilinger, Angelica Celaya, John Cuddihy, Armando Castro and director Agustin promoting Gabriel: Amor Inmortal, which was shot in Miami, FL, Bogota, Colombia, and Venice and Rome, Italy.



RAI Trade's Paolo Noseda

The big news about Africa was that even before the very first event took place, a second one was already being planned. Tentatively titled DISCOP Africa Part Two, the market will be held September 16-18 at the Nairobi Hilton in Nairobi, which is located in English-speaking Kenya. Since the Dakar market sold out so quickly, organizers, including Paris-based Patrick Jucaud, decided that a second event, to be held later this year, would be the best thing for the emerging market.

In total, NATPE featured 242 exhibitors, split between the convention floor and THEhotel. There were also some 300 buyers from 35

turn people are talking about how bad things are, but our industry has never had greater potential for growth," he said. Sweeney echoed his thoughts, noting: "The TV biz has never stood still. It's built to change every single hour every single year. This is a period of great revolution." Finally, when Silverman took the stage, he said that the "DVR is an unbelievably awesome tool for the consumers" and that "digital distribution was an inevitability" that networks should learn how to adapt to if they hope to survive. ●

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'A genuine expert can always foretell a thing that is 500 years away easier than he can a thing that's only 500 seconds off.'

— Mark Twain

As famed U.S. baseball legend and street-wise philosopher, Yogi Berra once remarked, "The future ain't what it used to be." Indeed, ZenithOptimedia, one of the world's largest advertising services groups with 195 offices in 70 countries, predicted zero ad growth in 2009. Similarly, competing London-based GroupM, part of the giant WPP Advertising Group, predicted that global advertising would fall by 0.2 percent in 2009. What a difference from a few years back when no CEO would be happy with future growth of less than double-digit figures.

On the other hand, New York City-based private equity firm Veronis Suhler Stevenson set the 2007-2010 compound annual growth at a respectable 3.8 percent for U.S. broadcast television and 5.2 percent for entertainment media.

Reading headlines like these can make you wish you had chosen an easier path in life — as a Middle East peace envoy, for example. But in our world, results count and right now it can be difficult to know where to look for them. Here are just a few suggestions we at *VideoAge* hope will prove useful and which might even elicit smiles on the Croisette.

For one thing, the ZenithOptimedia report, while predicting that advertising in North America and Western Europe will decline by 5.7 percent and one percent respectively, also sees "Asia Pacific and Central and Eastern Europe growing, albeit at a slower rate than previously predicted, and growth remaining healthy in Latin America and the rest of the world." The health of the Latin American market is underlined by predictions from GroupM, that the advertising market in Latin America is expected to see growth of 9.9 percent in 2008 (when final figures are in) and 8.1 percent in 2009 compared with 0.6 percent and -3.2 percent respectively for the U.S., -0.7 percent and -1.7 percent

for Western Europe and a worldwide average growth in 2008 of 2.6 percent and -0.2 percent in 2009.

Encouragingly, the ZenithOptimedia report also predicted that television advertising would hold steady in terms of the U.S. dollar, rising from \$184,487 million in 2008 to \$207,886 million by 2011. A modest gain for a three-year period perhaps, but still a gain, and a better performance than some doomsayers would have you expect. And the report sees television's share of global advertising holding steady — 38 percent in 2008 and 38.5 percent in 2011 — which would represent the highest share the medium has ever achieved. ZenithOptimedia said that this would happen in part because "advertisers will continue to shift the expenditure from secondary media to television, being familiar with its power to build brands."

This is a point echoed by Marcel Fenez, partner, Global Entertainment and Media Practice at PriceWaterhouseCoopers (PwC), although with one important caveat. "In terms of Internet advertising," he asserted, "This recession will differ from the last one in one significant way. At the time of the last recession," continued Fenez, "the Internet was very new, and new marginal outlets are the first and easiest to cut when times get tough. This time however, there are a number of markets with significant broadband penetration and an established Internet advertising business, and here the Internet will hold up and even outperform other media."

That in some areas this might be the case is underlined by a report from Stamford, Connecticut-based research house Gartner which said that "protail" video has grown 600 percent in the past year alone and goes on to predict that advertising around the form will "reach in excess of \$1.5 billion by 2012." By way of explanation, protail is defined by Gartner as, "that segment between professionally produced content and user-generated content," and the report went on to urge that "experienced video producers should hire, or work with, savvy Web 2.0 marketers to take advantage of complex

distribution opportunities."

ZenithOptimedia has also predicted Internet advertising growth in '09 of 18 percent in the U.S. and 12 percent in Europe. And, as this Gartner report emphasized, since both television and the Internet are essentially audiovisual media, it should be possible for people with skills acquired in television to take advantage of these healthy growth rates.

But some have their reservations about this. Greg Phillips, president of U.K.-based Fireworks International, acknowledged that, "one has to recognize that the Internet is a growth area, and that has certainly been true for us since we appointed Jonathan Ford as senior vice president, Digital Acquisitions and Sales, a year ago. But," he went on, "if I am honest, what concerns me is the extent to which this is really new money. If this is being earned off the back of audiences that have simply migrated from elsewhere, then the audiovisual pot as a whole hasn't gotten bigger, all that has happened is that it has changed its nature."

Other potential bright spots are companies with libraries. After all, the recession will not eliminate schedules, and the cheapest way to fill them is to purchase programming rather than making it yourself. And this is something Phillips felt bullish about. "I would expect broadcasters to trim budgets," he predicted, and, as he pointed out, "the cheapest way to do that is to cut back on original production and buy a bit more." While agreeing both that, "there is no denying that local production is more popular," and that, "the cost differential has been narrowing of late," Phillips still believed, "there will be finance departments all over the world asking budgetary questions that are likely to lead to a reduction in local production, and an increase in acquisitions."

PwC's Fenez, who is based in Hong Kong, also stressed that "we always thought that 2009 would fall off from 2008, recession or no recession, because we have lost the impact of the Beijing Olympics, but 2010 has a number of advertising drivers for the region, including The China Expo in Shanghai, the 16th Asian Games in Guangzhou,



PriceWaterhouseCoopers' Marcel Fenez

and the FIFA World Cup. So, while the first half of 2009 will be horrible, 2010 should be a lot better and we might even start to see the first signs of this towards the end of '09."

But, the big question of this whole exercise remains the track record, or the accuracy, of those predictions which in the past, in the case of Veronis Suhler Stevenson, tended to be off by only a few decimal percentage points.

So, while this is an undeniably tough period, and in reality is likely to remain so for most if not all of this year, and it is definitely too early to break out the champagne, maybe, just maybe, the time is not too far off when it will be okay to put it on ice in readiness.

As American writer Dale Carnegie, once said: "Remember, today is the tomorrow you worried about yesterday." BJ ●

But, the big question of this whole exercise remains the track record, or the accuracy, of those predictions which in the past tended to be off by only a few decimal percentage points.

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Spring Stimulus Package For Int'l TV Companies

Any market that happens in the midst of a worldwide economic recession is bound to feel some pain, but organizers of the 46th annual MIP-TV market hope that the event will serve as a stimulus package (à la Barack Obama) for both international content providers and TV outlets around the world.

Reed MIDEM, organizers of the market, which will be held March 30 to April 3, 2009 in Cannes, France, are counting on the fact that MIP-TV can show the entertainment industry's immunity to hardship with an event that doesn't seem to be holding back on anything.

VideoAge checked in with a who's who of MIP-TV participants and insiders to find out the *how*, the *what*, the *if* and the *but* of the market: *how* the economy will affect the market; *what* the market can do to further stimulate the business; *if* MIP-TV will continue to thrive; and the types of *but*s to be expected.

Commented Jene Elzie, vp, International Sales and Strategic Planning for Los Angeles-based Comcast International Media Group: "With our offices as far away as Los Angeles, London and Hong Kong, it's important that we are able to gather in one place to tend to our business. In today's world of Blackberries, laptops and text messaging, the art of human interaction can sometimes get lost, so it helps to have an event like MIP to bring it back into focus."

Nevertheless — and here's the first *but* — Elzie is a realist. As such, her company, which will be on hand



Ann Austen of Cookie Jar

promoting such shows as Style Network docu-series *Running in Heels* and Versus network's *Sports Soup*, won't be doing anything special such as a cocktail party this year. "We are being mindful of the economic climate like everyone else," she said. "This year is just not the time for a big, splashy event in our view." But she's still hopeful that things will pick up for the industry. "It has been shown that the greatest creative booms in the history of entertainment have come during times of economic hardship," she said.

Like Elzie, Mathieu Bejot of TV France International (TVFI) said that he too believed that MIP-TV would still be large and in charge. "MIP and MIPCOM are simply the only two mainstream markets targeting the whole world," he said. As usual, TVFI will be at the Palais des Festivals with an umbrella stand housing over 50 French member companies. When asked how the downturn in the economy would affect the market, he said: "People might be staying home and watching more TV during hard economic times, but it's more important to know whether advertisers still have money to spend. On the other hand, in a financial pinch, acquisition is certain to be more attractive than original production. It's hard to see at this stage to what extent sales will be affected by the current state of the economy."

Marielle Zuccarelli, svp of International Distribution for Sherman Oaks, California-based GRB Entertainment, which focuses on reality programming, said that despite concerns over cost this year, she still feels confident that GRB will flourish at the market. "I fully expect that MIP-TV will be a market of caution," she said. "Broadcasters

must make intelligent decisions on programming as budgets across the board have been cut. [But] GRB sits in a good position with quality reality programming that delivers ratings for broadcasters." In fact, Zuccarelli will be in Cannes with a wide range of non-fiction series, including *Danny Dyer's Deadliest Men*.

For Lynn Chadwick of Canada-based Nelvana Enterprises, the economic climate is a definite concern. "It's a challenge for producers and broadcasters alike," she said. "Budgets are restricted and that often means making tough choices on which markets you can attend." She noted that because of this, would-be market attendees will have to carefully select which shows are the most productive for them. "And MIPCOM," she noted, "having a stronger kids' focus, may well be the more successful of the two for animation-focused companies [like us]." Therefore, she's somewhat worried that MIP-TV will see reduced attendance. Regardless, she's hopeful that since MIP-TV is slightly smaller in scope than October's MIPCOM, she'll get more time to spend with individual buyers to discuss their programming needs in more detail.

Another Canadian rep who's worried about attendance is Andrea Stokes, International Sales and Acquisitions manager for Toronto-based Canamedia. "The combination of the poor worldwide economy, reduced marketing budgets and heightened registration fees will deter some independents from attending," she said. "This in turn limits the diversity of new programming and secondary broadcast markets to partner with."

Ann Austen from the Burbank, California offices of Toronto's Cookie Jar said that although she's certain that the Palais will be emptier than it's been in years past, she's convinced that the shared fiscal storm will force companies to work in tandem in order to find solutions. "In a weird way, we're all in the same boat so we'll have to work together," she said. Austen, who will be in Cannes promoting a diverse slate consisting of a new animated *Doodlebops* property and a teen movie of the week, *Tales From Cryptville*, noted that due to the hardships inherent in financing new productions in this market, she and her colleagues will be on the lookout for co-production partners to help minimize monetary risks for everyone.

Jon Helmrich of Los Angeles-based IBC also had some concerns about



GRB's Marielle Zuccarelli

overall numbers. "The big question is how attendance can be kept up with companies cutting back and cutting costs." Helmrich, who plans to continue to push the VOOM and Rush channels, specifically in Japan and India, said that he's lately picked up on a trend in which it seems as though many buyers are choosing to attend either MIP-TV or MIPCOM — but not both. "A lot of us will be going into the market with our fingers crossed," he said.

Unlike most of the executives *VideoAge* spoke with for this article, Claudia Sahab, director of Europe for Mexico-based Televisa, seemed almost unconcerned about the economy, noting that her company's vast supply of content, including typical and teen-focused telenovelas as well as entertainment and reality formats, should give it a leg up at MIP. "With the economic crisis in full swing, Televisa can be a very good partner for nearly everyone because we have a lot of finished content," she said. "If a telenovela works for a given channel, it's the best thing that could ever happen to that channel since you have three months of continuous programming and can therefore forget about a timeslot for three whole months." Sahab, who said that she and her colleagues, who will be focused on closing volume deals in all areas of Europe at the market, view the world's financial meltdown as "an opportunity for us."

Brazil-based TV Globo's Raphael

(Continued on Page 22)



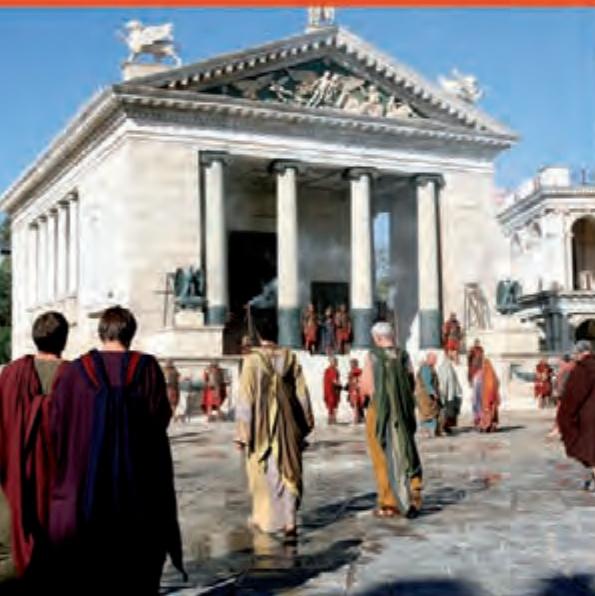
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MIP-TV [Continued]

(Continued from Page 20)

Correa Netto, head of International Sales, was also optimistic about the market, noting that the company plans to use MIP-TV to "reinforce our participation in Asia, highlighting Malaysia and Korea, as well as European regions such as Germany, Spain and Italy, Nordic regions and Scandinavia." Globo also hopes to see more growth on the African continent, particularly in Mozambique.

Karina Etchison of Miami, Florida's Telemundo said that she too is looking forward to finalizing sales galore at MIP-TV. "[The market] might be a bit quieter this year, but it'll give us an opportunity to be more creative in our

approach with clients," she said. "People still need content and novelas work across the board," she added, mentioning that her biggest pushes of the market will be for the mistaken identity love story, *Analia*, and *The Storm*, a soap that she is now trying to bring to sub-Saharan Africa.

For David Ellender, CEO of U.K.-based FremantleMedia Enterprises, the state of the economy doesn't worry him. "It's extremely likely that the economic climate will make buyers more selective," he said. "But we're confident that our existing hit brands and franchises — *American Idol*, *Celebrity Apprentice*,

America's Got Talent, *Project Runway*, *The Janice Dickinson Modeling Agency*, international drama sensation *Merlin*, as well as series by Jamie Oliver, Martha Stewart and Emeril Lagasse — will carry us through."

Patrick Elmendorff, managing director of Munich's Studio100 Media, concurred, noting that "buyers and sellers will be cautious," but that the financial situation won't slow his company down. "We are focusing on shows for preschoolers and character-driven stories with strong storylines for both girls and boys," he said.

Regardless of the many misgivings about his year's MIP-TV, the market's



Comcast's Jene Elzie

organizers have arranged for a wide range of seminars and conferences, including a keynote from Ynon Kreiz, CEO of Netherlands-based Endemol Group, who will deliver a speech detailing how content creators need to be bold and innovative in order to achieve growth. Additionally, Sir Martin Sorrell, CEO of U.K. advertising and marketing communications giant WPP Group, will speak to the theme: "What screens will they watch — and what will be on them?"

The market will also offer a "Focus on China," and will feature a number of events and private receptions dedicated to the region. China's State Administration of Radio, Film and Television (SARFT) Vice Minister Tian Jin will lead a Chinese industry delegation at the market. In recent years, the Chinese government has significantly developed the TV drama, documentary and animation sectors. SARFT plans to use MIP to encourage international players to embark on more factual co-productions with Chinese organizations with a seminar entitled: "Cooperation Between China and Other Countries in Television Programs."

One TV executive happy to be at MIP for the Focus on China festivities is Michel Rodrigue of Montreal's Distraction Formats. Rodrigue is hoping to use his time in Cannes wisely, meeting with potential partners from territories where he doesn't normally spend a lot of time, such as Australia, South Africa, and of course, Asia. "China is always very interesting," said Rodrigue. "We always want to know what they're buying and why." Rodrigue also stressed that he expects to see diminished attendance at MIP-TV. "In an economic crisis, you have to cut costs. And where do you cut costs? In traveling. In being at markets."

Preceding the market, on March 28-29, will be MIP-TV's annual MIPDOC, which will showcase some of the best documentary and factual programs that the world has to offer. Last year's event boasted 776 participants from 60 countries, as well as 433 buyers.

MIP-TV 2008 drew 13,360 participants, up from 13,311 in 2007. Some 4,551 companies from 111 countries took part in the market. Many expect that the economic crisis will lead to decreased numbers for this year's edition. LHR

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AFM-Inspired EFM Proves February a Resilient Month

Once again the European Film Market (EFM) proved itself to be the key winter market for the movie industry, with or without the worldwide economic downturn.

As part of the Berlinale festival, now in its 59th year, and which took place in Berlin, Germany, February 5-15, the EFM started out a bit low key but picked up the pace over the weekend. The weather was also good, except for a few snowflakes during the latter part of the event.

Under the direction of industry veteran Beki Probst, the market has been thriving, especially after the Santa Monica, California-based American Film Market (AFM) unwisely switched its dates to the fall. As a matter of fact, it was Probst's idea to rename the event EFM (it was previously called Film Fair), in order to equate itself with the U.S. film market at a time when the two trade shows were in direct competition. The name "Berlinale," on the other hand, was inspired by an art show in Venice, Italy, called Biennale.

For the past four years, the EFM has been headquartered in the Martin-Gropius-Bau (MGB) building, a museum a couple of blocks south of Potsdamer Platz, the popular center of the German capital.

However, the impressive MGB



Imagination's Pierre David

building has proven that it is not large enough to accommodate the increasing number of exhibitors. This is the reason for a second official location, which is traditionally added to the main EFM venue. This year the spillover of exhibitors that could not find space in the MGB found a new home at the Marriott Hotel, just a block away from the Berlinale Palast (also called Filmpalast), Berlinale's main screenings and ceremony site.

Three floors of the Marriott were dedicated to EFM suites, with a lot of business activity spilling down to the ground floor lobby area and bar — the venue of choice for those who opted for



Mondo TV's Roberto Farina

an informal presence. Shuttles moved attendees quickly from the Marriott hotel to the MGB whenever they needed a lift.

As usual though, it was the Martin-Gropius-Bau venue that continued to generate the heavy traffic, with three major territory-based umbrella organizations: the Italian, German and Canadian pavilions. Several exhibitors managed to expand their stands by taking advantage of the space vacated by distributors who opted not to exhibit this year, such as Los Angeles-based Lakeshore Entertainment, which opted to attend without a stand.

One of the companies that expanded its presence was Canada's CinemaVault, whose Ruby Rondina expressed great satisfaction for the more central, larger stand she and her colleagues occupied this year. Bavaria Film, also in full force at EFM, reported brisk biz with the sales, among others, of *Krabat* and *Let The Right One In* to Japan and double Golden Bear awards to drama *Everyone Else*. Even small companies, such as Culver City, California-based OddLot, managed to boast healthy sales for its movies.

Most exhibitors renting offices at the Marriott were pleased with the hotel suite setting, among them New York-based distributor Screen Media Ventures and Italy's RAI Trade, whose CEO, Carlo Nardello, announced sales for features *Ex*, *Il Papà di Giovanna* and *L'ultimo Pulcinella*, to Spain and Latin America.

A total of 407 companies from 55



Eagle Films' Jamal Sannan, l., with Screen Media Ventures' Almira Malyshov and Michael Dwyer



CinemaVault's Ruby Rondina

countries exhibited. Of these, 315 were at the MGB and 92 were at the Marriott. More than 1,400 buyers from 59 countries were registered. Last year's event saw 430 exhibitors, but had fewer buyers (1,073).

The economic crisis obviously took its toll on business, especially as far as sales to the U.S. were concerned, and mid-budget projects with no major stars attached found increasing difficulties with raising financing.

On the Festival front, the 59th Berlin International Film Festival came to a close with the Awards Ceremony held in the Berlinale Palast and attended by some 1,600 guests. The main prize, the Golden Bear, was awarded to Peruvian movie *La Teta Asustada*, directed by Claudia Llosa. Movies that get top prizes at the Berlinale tend to be favorites among movie critics, but they are often ignored by the trade press and, more importantly, by moviegoers at large. This trend has spilled over to such commercial awards as the Oscars, where the combined U.S. box office of the five nominated best movies was less than what *The Dark Knight* grossed on its own.

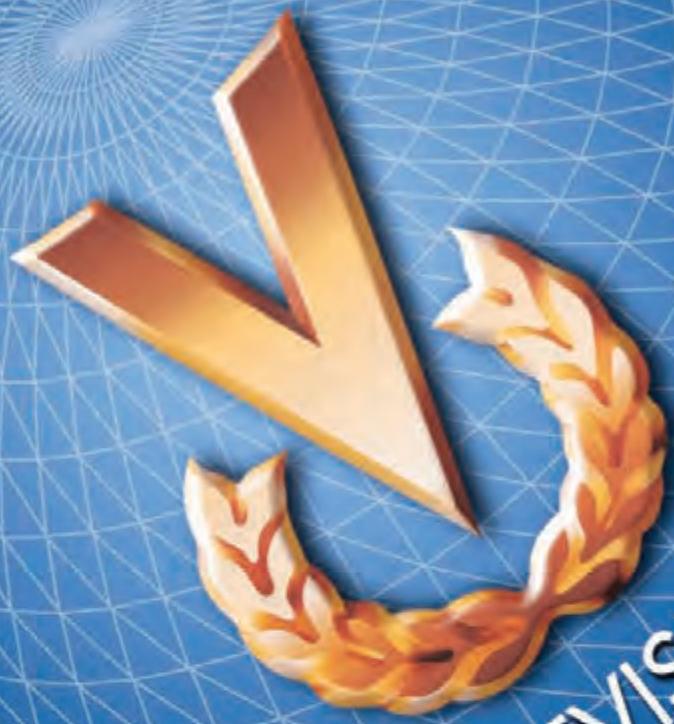
In total, 383 films were shown in Berlin at 1,238 screenings held at different movie theaters throughout town, including two new venues, the Friedrichstadtpalast and the Cinema Palast in the Institut Français. A new challenge next year could be presented by the conflicting dates of the Rotterdam Film Fest (IFFR), which is scheduled January 27-February 7. These dates could overlap with Berlinale if the festival opens its doors during its traditional first week of February. ●



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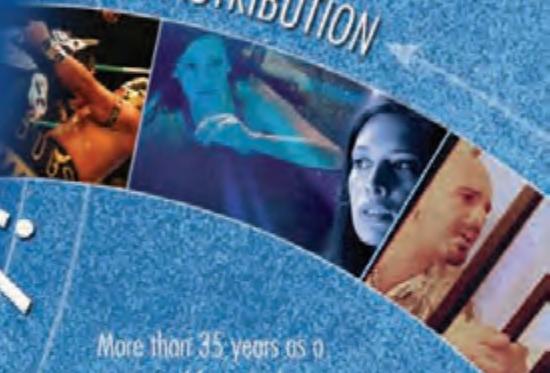


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The power of experience, innovation and synergy at work in the new world of international entertainment!

Media Agency Bankrolls Singapore's TV, Film Biz

Three elements contributed to put tiny city-state Singapore on the map: Former Singapore prime minister and current minister mentor Lee Kuan Yew (he first oversaw the separation of Singapore from Malaysia in 1965), its U.S.\$300 billion GIC fund (the world's third largest sovereign wealth fund); and the Media Development Authority (MDA), the over half-billion U.S. dollars a year fund that is making Singapore one of the media capitals of the world. To understand the how and how much, *VideoAge* went straight to the top, quizzing MDA's CEO, Christopher Chia.

VideoAge International: Dr. Chia, thank you for talking to us. Let's start with finding out what the MDA does exactly, why it was created and what existed before?

Christopher Chia: MDA was formed by the merger of the Singapore Broadcasting Authority, the Films and Publications Department, and the Singapore Film Commission, in January 2003 with a charter to transform Singapore into a Global Media City. Domestically, MDA's priorities are to grow the revenues of the media sector, create jobs, and classify content to create more media choices for consumers.

VAI: Looking at the "MDA upper management rap" on YouTube, one realizes that you take show business really seriously — both the "show" and the "business." Let's focus on this latter part and talk money. How much money per year does MDA dispense?

CC: Under the Media 21 blueprint (which has guided MDA's industry development efforts since our formation in 2003), a total S\$165 million (U.S.\$94.7 million) was committed over five years to help Singapore media companies in content development, market development and capability development. But while funding support to Singapore projects and companies through grants and co-investment schemes is core to our efforts to grow the media sector, what is more critical is catalyzing and helping to sustain a thriving media ecosystem — one that continuously attracts talent, ideas, capital and enterprises to create international products and services from Singapore.

For this to take shape, it is important for private capital to be injected into the system. Today, more than S\$1 billion (U.S.\$672 million) worth of media funds are based in Singapore, with several media financing companies making Singapore their base for operations. The figure is a cumulative total, as a result of private capital injected by banks, financial institutions and strategic investors over the past few years, covering sectors such as television, film, games, animation and distribution markets. Some examples include:

a. U.S.\$400 million fund managed by RGM Entertainment to produce a slate of 10 international projects over four years, involving Singapore companies in production or post-production.

b. U.S.\$40 million European-Singapore Co-Production Fund managed by Singapore distribution company Six-Six-Eight to produce a slate of TV and film projects.

c. The S\$10 million Raffles China Media Fund (U.S.\$6.64 million or RMB50 million) to co-invest and co-produce movie projects for distribution in China.

d. Hyde Park Entertainment's S\$75 million (U.S.\$53 million) to acquire, develop, produce, distribute and exploit a slate of at least eight feature-length motion pictures over the first five years of its operations in Singapore.

e. Salon Media's S\$100 million (U.S.\$70.68) integrated media fund.

VAI: How many film-TV projects do you help finance per year. And how many are non-Singaporean?

CC: Our support is channeled to Singapore-based companies and projects with Singapore involvement, with the number of projects varying from year to year.

Film: We support the film industry primarily through our Singapore Film Commission (SFC) arm. More than 400 short films have been supported since 1998, while at least 300 filmmakers have been supported by the Overseas Travel Grant.

Last year, we introduced the New Feature Film Fund providing first-time Singapore filmmakers with up to S\$250,000 (U.S.\$176,703) each to direct their feature films in collaboration

with experienced film production companies. Nine filmmakers have been awarded the grant. In addition, the SFC Stereoscopic 3D Film Development Fund and the SFC 35mm Fulfillment Fund introduced earlier this year aim to fill in the gaps to augment the development of the film sector in terms of technology and distribution support.

Television: In the area of television, MDA has supported and facilitated between Singapore companies and their international partners, a substantial slate of Asian-themed international [fare]. Increasingly, much emphasis has been placed on Asian factual content with the potential for international distribution across different platforms such as digital and mobile, books, games and merchandise.

We have, in recent years, introduced targeted initiatives and entered into collaborations to encourage more of such productions with multiplatform potential.

One such example is the [joint MDA and Australia's Screen West] Cross-Media Development Initiative, following the ratification of the Australia-Singapore Co-production Treaty, to encourage Singapore and Western Australian companies to jointly develop and exploit the potential of multi-platform intellectual properties. Following its launch, two Singapore companies have been awarded development support. The first is *Off The Wall* by Singapore's Scrawl Studios and Australia's Zac Toons. The second project, *Origami Samurai*, involves Singapore's Sitting in Pictures and Australia's Vue DC.

Another recent partnership is with FremantleMedia Enterprises to co-develop projects on Asian subjects and ideas with international appeal that are exploitable across multiple platforms. Three Singapore media companies, Imaginary Friends Studio, Oak3 Films and Ochre Pictures, have since obtained developmental investment.

To assist our television companies in building their multiplatform content development capabilities, MDA launched "Pilot — Television Content 360," in December last year — a grant scheme to support Singapore production companies to develop original ideas and innovative concepts across multiple media formats and/or platforms.

Over and above the projects above,



MDA's Christopher Chia

MDA funds about 4,000 hours of public service content ranging from current affairs to drama, sports and children's programming.

Animation Development: In the area of animation content, MDA has supported over 50 projects ranging from concept development to commercialization of intellectual property into animated feature films and TV series. MDA has three schemes for 2D or 3D animation content — "Ideas," "Pilot" and "Screen." "Ideas" provides grant funding for concept-development level projects. "Pilot" provides grant funding for trailers or pilot episodes, while "Screen" finances a project by taking an equity stake in a fully animated television series or an animated feature film. To date, more than 60 Singapore game development and animation studios are actively developing content for Mobile, Casual PC, Online and Console platforms.

VAI: How big is the film and TV industry in Singapore?

CC: Singapore's media sector has enjoyed steady growth since the industry's national blueprint, Media 21, was unveiled in 2003. As of 2006, revenues from the media sector stood at U.S.\$12.27 billion (\$19.5 billion) and employed over 54,000 people.

Of note was the increase in higher value jobs, with the value-added per employee rising from approximately S\$76,000 (U.S.\$44,086) in 2000 to approximately S\$91,290 (U.S.\$ 57,455) in 2006.

From just serving the needs of local audiences five years ago, made-by-Singapore content nowadays can be found entertaining audiences across the globe in over 50 countries.

Between 2003 and 2007, MDA co-funded 173 projects creating some 2,000 jobs and S\$184 million (U.S.\$122.1 million) of investment spending in Singapore.

VAI: Finally, can you explain the upper management structure? How is it appointed?

CC: My senior management team reports to a 16-member board of directors appointed by Singapore's Minister for Information, Communications and the Arts, comprising industry professionals. ●

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E1 Entert.: A Mini-Major Emerging from Canada

By LEAH HOCHBAUM ROSNER

With the demise of AllianceAtlantis, the splintering of PeaceArch (see related story in World, page 6), the disappearance of Chum TV and the "relocation" of Cookie Jar, the international TV industry was on the verge of bidding farewell to Canada as the birthplace of large content providers, leaving CCI as the lone mid-size entertainment company to carry the torch.

Just as the international film and TV industry was about to go into mourning, a bright light of an entertainment company emerged from North America projecting a large E1 in cubic characters on the skyline. And this vision is not too farfetched, since this newly minted Toronto-based production and distribution company has a cubic E1 logo etched onto a sky blue background.

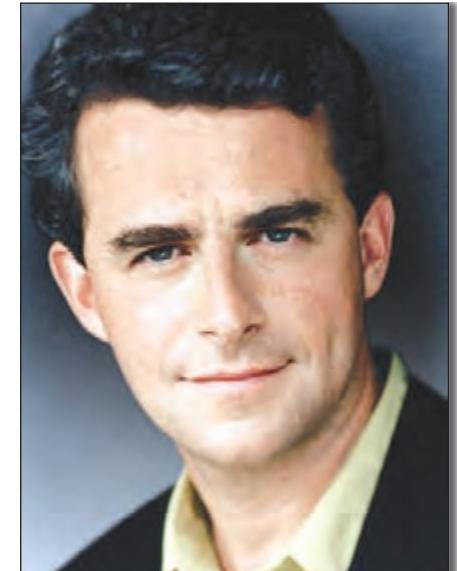
Now, for E1 Entertainment, as the company is officially named, the 2009 edition of MIP-TV will be more than just a marketplace for buying and selling programming. It'll be the launch pad for the new, improved and consolidated E1, which will be at the international market for the first time under its brand new moniker. The company, which changed its name from Entertainment One to E1 in January after completing a series of acquisitions, is hoping to use the Cannes convention to show the world that E1 is truly a force to be reckoned with in the entertainment industry both in Canada and internationally.

"We changed the name to leverage all of the international brands that we have," said Peter Emerson, president of E1 Television International, the International Sales and Distribution division of the entertainment group, who is based out of the company's Toronto headquarters. In recent years, the company has spent much of its time and capital acquiring other firms. Some notable pick-ups include: U.K.-based TV distribution outfit Contender Entertainment Group in June 2007; Canadian film distribution and entertainment rights owner Seville Entertainment in August 2007; and RCV Entertainment BV, an independent film distributor operating in the Netherlands and Belgium in January 2008. Later that year, in July, E1 also

acquired Canadian TV production houses Barna-Alper and Blueprint Entertainment, along with Oasis — a Canadian film, international sales and distribution firm that Emerson founded in 1991 — and Maximum, another Canuck film and TV distribution company. "I spent more time at last year's MIPCOM explaining all the interconnections and making people aware of the size of the global enterprise than I would've liked," said Emerson.

"So [changing the name] was an obvious no-brainer thing to do."

Entertainment One was launched in 1973 in Ontario, Canada by Don and Vito Ierullo as Records on Wheels Limited (ROW). At first, ROW focused on retail sales of recorded music. In the 1980s and 1990s, distribution became the company's primary concern, and the product expanded to include video, as well as music. In 2003, the company expanded its product range even more



Peter Emerson, president, E1 Television International

with the inclusion of video console games. Later that year, ROW changed its name to Entertainment One Income Fund and quickly established itself as one of the largest distributors of home entertainment products to the non-direct segment (meaning the segment not served directly by major studios) of the Canadian market. In June 2005, Entertainment One purchased Koch Entertainment, which represented a big step into independent music and video distribution in the U.S. through Koch's distribution unit. In March of 2007, the Entertainment One Income Fund was acquired by Entertainment One Ltd., which has been a public company since 2003. And since then, the company has made a series of acquisitions in Canada and the U.K. (including the aforementioned Blueprint and Barna-Alper pick-ups).

"Our vision is to build the global brand and make ourselves the number one independent content provider in the world," said Emerson. "We're not a studio, but it's a studio model," he noted, comparing E1 to mini-majors like Lionsgate or U.K.-based FremantleMedia.

And the company would have kept right on acquiring more and more firms if not for this pesky worldwide financial meltdown. "There's not a whole lot of mergers and acquisitions going on right now," noted Emerson wryly. "But we're almost fortunate that there's a bit of a lull right now as it's kind of nice to be able to integrate the companies we now have," he said. "The bigger you get, the harder it is to leverage every asset. It's best to be able to quantify what you've got." Yet, needless to say, he noted that once the credit crunch is a thing of the past, he's confident that E1 will continue down its acquisitive path. In the meantime, he and his colleagues are concentrating on building strategic alliances with partners around the globe, and have been focusing on expanding into such territories as Scandinavia, Germany, France and Spain.

Under the new E1 name, the company integrated all of its operations into four main units: E1 Television, E1 Films, E1 Music and E1 Distribution. Children's producer and distributor Rubber Duck and Blueprint Kids

(Continued on Page 30)



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Company Profile (Continued)

(Continued from Page 28)

became E1 Kids (under E1 Television).

These four divisions (or pillars) represent the company's operations in film distribution and television and music production/distribution. In addition to its Toronto headquarters, the company also boasts offices in New York City, Nashville, Benelux and London.

Barna-Alper, Blueprint and Oasis were folded into E1 Television. Former Blueprint head John Morayniss was tapped as CEO, while Barna-Alper founder Laszlo Barna was named president. Emerson, founder of Oasis, was dubbed president of

E1 Television International.

Under the E1 Films heading, Canadian distributors Seville Pictures and Maximum Films combined to form E1 Entertainment Canada under the leadership of co-presidents David Reckziegel and Bryan Gliserman, while U.K.-based Contender began operating as E1 Entertainment U.K. under managing director Richard Bridgwood. Seville International and Maximum International also combined to form E1 Films International. And Koch Entertainment founder Michael Koch

and Koch executive Michael Rosenberg were appointed to head E1's U.S. film distribution under the E1 Entertainment U.S. banner.

As for E1 Music, Koch was named CEO, overseeing E1 Records and E1 Music Publishing and Koch Canada became E1 Music Canada. Under the E1 Distribution division, E1's Canadian wholesale unit changed its name to E1 Entertainment Distribution Canada under the leadership of Terry Stevens. And Koch Distribution was retagged E1 Entertainment Distribution U.S., also



Valerie Cabrera, evp, E1 Television International

under the leadership of Koch and Rosenberg.

At MIP-TV (see preview on pg. 20) E1 will premiere its newer, consolidated self with a larger stand in the Palais des Festivals' Riviera Seaview and is planning a big party for Monday night. The company will hit the market with 268 new hours of television programming — nearly half of which were produced internally — and a small army of around 20 executives.

"We're a one-stop shop for all your needs," said Valerie Cabrera, evp, E1 Television International, who operates out of the firm's Los Angeles bureau, and handles sales to France, Italy, Benelux, Latin America and Hispanic U.S. While she's proud of a lot of E1's programming, she's most confident in the prospects for *Majority Rules*, a live-action/animation hybrid series that's a co-production with Canada's Teletoon and *The Courageous Heart of Irena Sendler*, a Hallmark made-for-TV movie that will star Academy Award-winner and star of HBO's *True Blood*, Anna Paquin. She's also excited about the fact that the company has a wide array of primetime offerings, including a soon-to-be-named Canadian drama with what she termed "a well-known" cast.

And while her company's put the kibosh on buying any new firms for the time being due to the credit crunch, Cabrera isn't letting financial worries get her down. In fact, she's not at all concerned that attendance will be diminished at the Cannes convention. "As far as buyers go, I don't think there will be fewer people," she said. "I just think they'll be pickier, which is good for us since we have so much to offer."

The new year is shaping up to be a good one for E1, and Emerson, for one, sees nothing but blue skies ahead: "We're getting more product — decidedly better product — and when things rebound we'll get back on the acquisition trail." ●

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AGICOA

(Continued from Cover)

in Europe of content owned by independent producers.

It all sounds good... on paper. Why then — despite having collected and disbursed something in the order of half a billion euro since the year 2000 — have some industry people still never heard of AGICOA? Here, *VideoAge* attempts to unlock the mystery.

When Europe's cable industry emerged in the mid '80s it created a whole new set of rights known as retransmission rights. The basis on which these rights are granted can be found in the Berne Convention (for the Protection of Literary and Artistic Works) which, in its 1979 amendment, stated that, as cable operators' signals are distinct from the originating broadcaster, their transmission must be treated as a separate entity and are therefore subject to the payment of a royalty.

Most European cable operators, however, refused to recognize this obligation, arguing that carriage on their systems was simply an extension of the transmission already licensed to the originating broadcaster. But in a case brought by a number of American film producers and the Dutch Cinema Association against a cable operator in Amstelveen, a city south of Amsterdam, Holland, the Dutch Supreme Court issued a decisive verdict against the cable company. Subsequently, the courts of other European countries began issuing similar verdicts in those types of cases. It was during this period that the British producers organization PACT (Producers Association of Cinema and Television), America's MPAA (Motion Picture Association of America) and FIAFP (International Federation of Film Producers Associations) together formed AGICOA.

Curiously, it was only in 1989, when the "Berne Convention Implementation Act of 1988" came into effect that, for the first time, the U.S. became a party to the Berne Convention, thus making the 1952 Universal Copyright Convention (for those states which disagreed with aspects of the Berne Convention) obsolete. Since almost all nations are members of the World Trade Organization, its Agreement on Trade-Related Aspects of Intellectual Property Rights now requires non-members to accept almost all of the conditions of the Berne Convention.

Going back to AGICOA, in effect it works by issuing a blanket license to individual cable operators and then collecting royalties for all programming

the operator retransmits. In order for a producer to collect the money owed, it first must register with AGICOA and then prove title to the program in question. The first such agreement was issued by AGICOA in 1984 in Belgium, and following a 1993 directive by the E.U., it is not possible for an individual producer to try to collect royalties directly. The only way to access this money is by registering with AGICOA. Although AGICOA only exists to work on behalf of producers and broadcasters, it continues to have the right to negotiate individually with cable operators.

However, the good news, explained Geneva-based Pierre Oberholzer, AGICOA's Customers and Distribution director, is that, "the process rights holders have to follow to be considered for royalty payment is simple." And, it is also free. "Firstly," explained Oberholzer, "the production company must be registered with AGICOA, providing contact and bank details and stating who at the company is authorized to deal with AGICOA. Once this is done," he continued, "AGICOA will assign the company a portfolio manager, whose responsibility it is to ensure that his/her assigned rights holder experiences as smooth an interaction with AGICOA as possible."

"Once all of this is done," said Oberholzer, "all that remains is for the rights holder to declare the copyrights

they hold, e.g. 'I have the copyright for the film *The Amazing AGICOA* for rebroadcasts spanning 2002 to 2010 for the French version in Belgium.' And that can be where the registration process ends, and the fun starts."

Greg Phillips, president of U.K.-based Fireworks International, was happy to declare that, "when AGICOA was first established, it was a God-send. Because the truth of the matter is that at that time very few if any, in the distribution business had ever thought about retransmission rights, and every time you get a check from AGICOA it is fantastic. But," cautioned Phillips, "getting paid by AGICOA is not an easy task and dealing with them is not always an uplifting experience. Although I would say this is not always their fault because once you register a claim to title, you often find that you are not the only one claiming it, and, quite rightly, AGICOA will not pay out until they are satisfied they know who the rightful owner is. In principle," concluded Phillips, "it is a damn good idea, and in a perfect world, filled only with honest people it would probably work like dream, but..."

John O'Sullivan, CEO of British collection company Compact Collections and also a board member of AGICOA, made a number of other useful points. The first was that, "retransmission rights can only be collected from cable operators in



Compact Collections' John O'Sullivan

countries where legislation exists, making such payments a requirement for re-transmission. The U.K. doesn't have such legislation, and here no such collections can be made." O'Sullivan was also keen to point out that AGICOA "only collects retransmission rights whereas companies such as Compact, who represent all the U.K. broadcasters, many of the largest production companies and a huge slab of the Hollywood majors, collects all secondary rights including such rights as educational copying and private performance rights."

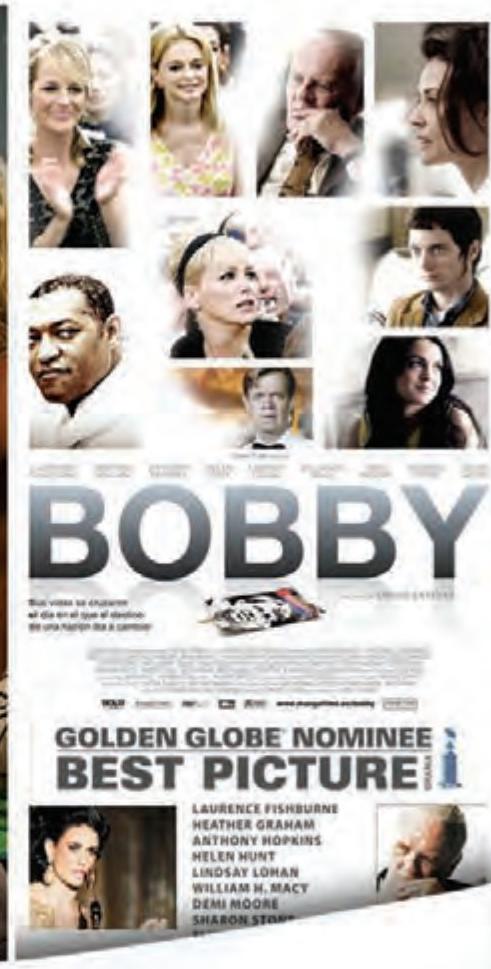
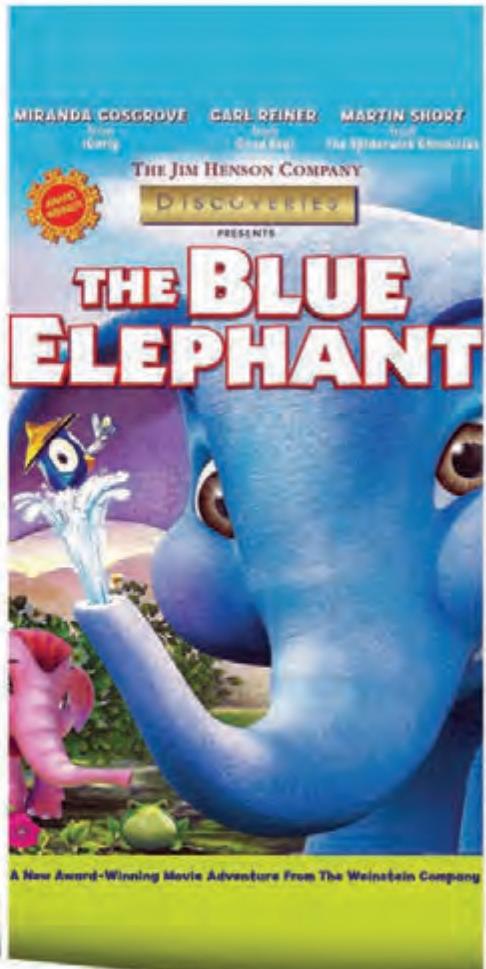
If a producer fails to register its title with AGICOA, the money due from any retransmission will still be collected from the cable companies by AGICOA, and generally the money will be held for three years, at the end of which time it will be redistributed on an equal basis between all registered companies. The exceptions to this three-year rule are Ireland, where the period is five years and France where it is 10. And, said Compact's O'Sullivan, "this is the system used by all major collection agencies such as the PRS [the London-based Performing Rights Society at www.prssformusic.com], and I have to say, that AGICOA, which is a not-for-profit organization, does a pretty good job."

Oberholzer revealed that AGICOA currently has agreements with cable and satellite operators in place in 35 countries and is negotiating to enter Latin America "in coordination with EGEDA [the Madrid, Spain-based Audiovisual Producers' Rights Management Association, which is also active in Chile, Colombia, Ecuador, Peru and Uruguay, at www.egeda.es]."

Oberholzer also revealed that AGICOA has 7,000 producers registered with it, who between them have shared royalties of more than half a billion Euro since 2000. Anyone who would like to join them can follow the simple process at www.agicoa.org. ●

AGICOA's "illuminating" brochure

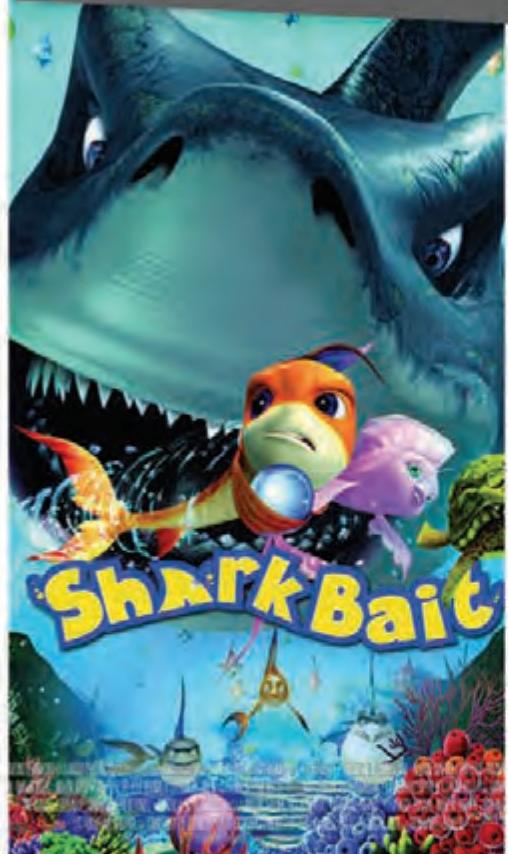
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Analog Dollars Vs. Digital Pennies: The TV Industry Quandary

By LEVI SHAPIRO

If you want to start a "show me the money" discussion in Hollywood, don't mention online video. However, there are eager listeners when the subject is premium TV content. ABC's *Lost*, for example, was viewed by more than 1.4 million unique viewers in December 2008 (according to Nielsen). The growing traffic and robust CPMs (cost per thousand impressions) for premium online video suggests a promising advertising market.

So the problem has not been with existing TV shows migrating to the Internet. What has been lacking are programming and advertising formats that reflect the new medium.

This is despite the good news that the Internet audience is much younger, wealthier and better educated than the TV set audience. Advertisers will pay a premium for access to this 18-49 demographic, lifting CPMs for premium content online to over \$25. Advertisers also like the ad recall rates of 21 percent for streaming video, more than double the recall for TV.

Moreover, digital consumption is both additive and doesn't cannibalize traditional platforms. More than 80 percent of the online audience was unable to view the original program on the TV set. Despite the additional viewing options, Americans still watch more television than ever, 142 hours per month in the third quarter of 2008 (per Nielsen).

From a small base, New York-based research company eMarketer estimates that spending for U.S. online video advertising will double from last year (\$587 million) to \$1.25 billion in 2010. Specifically, long-form premium content, which is now 41 percent of U.S. online video streaming ad revenues, should increase to 70 percent of revenue by 2013 (according to the Dallas, Texas-based research firm Diffusion Group).

The bad news is revenue. One senior broadcast executive estimates that for the same viewer, revenue from an hour of online viewing is only one-third for the same viewer on television. Some of that difference represents the 18 minutes of advertising available on

broadcast television compared to the four-to-six advertising pods (or group of ads) online. Welcome to what NBC's Jeff Zucker termed the "analog dollars for digital pennies" comparison.

The TV industry has begun to explore new advertising and creative formats for the Internet entertainment sector. "At the moment," said Hardie Tankersley, vp, Online Content & Strategy at Fox Broadcasting Corporation, "online shows are still TV shows, crammed into a different place. We need to take advantage of what an interactive computer platform does well and develop creative and interactive models for advertising. It is a creative problem more than a technology or business problem."

Agencies are getting plenty of TV Internet-related data. Unfortunately, it is not all relevant from a brand-activation perspective. Yaakov Kimmelfeld, svp, Analytics at New York ad agency Mediavest, said, "there are still challenges for successful planning and making the [TV-Internet] campaigns accountable. We can measure user engagement, based on viewing behavior. The trick is to tie these behaviors to branding impact and brand ROI [Return on Investment]."

Brands, agencies and TV broadcast networks are collaborating to resolve those issues. The Interactive Advertising Bureau issued guidelines last year for online video advertising standards. The Disney-owned ABC TV network announced its own emerging media and advertising research lab in Austin, under the direction of Australian professor Duane Varan (who did not answer *VideoAge*'s questions on the subject, after initially expressing interest).

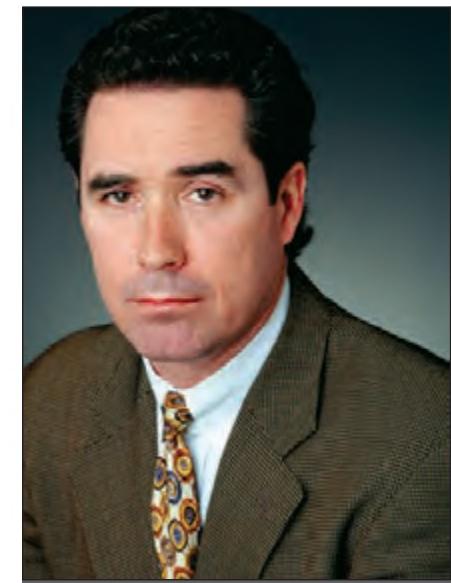
Perhaps most promising is an industry consortium, led by Chicago-based Starcom Mediavest that unites major advertisers and content publishers to field-test the efficacy of online video ad units.

Already, online video site YouTube offers advertising with its full-length, premium videos. The company has championed overlays, which appear in the lower third of video screens and are less intrusive. However, the format has failed to gain traction with advertisers and most of YouTube's \$200 million ad revenue has come from display ads. Hoping to validate the overlay format, Google partnered with

Berkeley, California-based NeuroFocus, a research company that applies neuroscience to the world of advertising, and used biometric measures like brainwave activity, eye-tracking and skin response to measure the impact of overlays. Based on criteria including attention level, emotional engagement and memory retention, overlay ads scored a respectable 6.6 out of 10.

The biggest difference among the U.S. TV networks has been the approach to TV-Internet programming. Walker Jacobs, senior vice president for New York's Turner Sports and Entertainment Digital Ad Sales, uses content "as a complement to the television experience." For example, hardcore fans of Turner sites like NBA.com (basketball), NASCAR.com (stock cars), PGA.com (golf) or CNN.com (news) have an online experience that is a complement to the on-air experience. "We have a product called TNT Overtime with additional camera angles. We also have live programming for PGA.com. That means people at an office can follow one group or one golfer. It is not the same broadcast but an alternate view of that broadcast." Turner is careful not to jeopardize cable systems' partnerships with its Internet efforts. "We certainly don't believe in ubiquity. We will segment out the type of content we will syndicate [such as sports highlights], whereas live programming is something we generally keep in our domain."

MTV Networks migrated to an online, ad-supported TV model about two years ago. Alice Kim, svp of Digital Distribution & Partner Relations, said, "there have been surprises. During the election, we saw over one million streams of *The Daily Show* and *The Colbert Report* per week, which did not cannibalize iTunes sales. Also, we were not expecting online success of the archives. Shows like *Bromance* found a niche online. MTV Networks also cut a deal with MySpace and Auditude (a Palo Alto, California-based company that fingerprints or tags media content and attaches advertising to that content as it is syndicated across the Internet) in which all MTV content is fingerprinted. If a user uploads a video from an MTV show such as *Punk'd*, Auditude will recognize it, attach some ads and MySpace splits the profits with MTV. "This gives us a way to monetize user uploads."

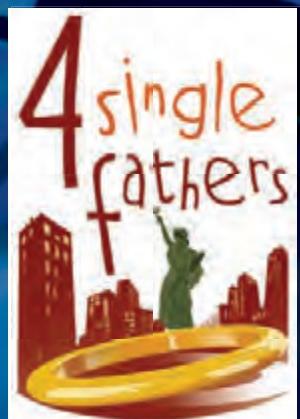


ABC Television's Patrick McGovern

ABC has used its full episode player as a means to establish a high quality viewing experience in a controlled environment. As a result, despite syndication agreements with ABC affiliates AOL, Veoh, Fancast and Cox, more than 95 percent of viewing comes from the ABC.com website. This has helped to ensure higher CPMs. Patrick McGovern, svp, Sales and Strategic Planning and Digital Media at ABC Television (part of ABC network) told advertisers "we care as much about a consistent user and advertiser experience as you do." This also has enabled easier data collection for ABC's 100 advertisers. "We found that additional brands and commercials per episode did not hurt aided recall." Based on Nielsen numbers ABC had seven of the top 10 streamed programs. It should be noted that CBS network, with an Internet syndication strategy oriented toward ubiquity and openness, had the fewest number of programs in Nielsen's top 10.

Measurement techniques (e.g., metrics) need to evolve as well. Walker Jacobs of Turner commented, "metrics need to reflect this different medium," while Patrick McGovern of ABC noted, "a large portion of our audience are Mac users. That is not measured by Nielsen or [Internet marketing research company] ComScore. As an industry, we need to get better at measurement."

Finally, there are companies addressing the technical challenges as well. Explained Doug Knopper, a former executive at New York-based DoubleClick: "Content owners may have multiple shows with different distributors (for example, ABC owns *Grey's Anatomy*, which is shown across different distributors online such as AOL, Cox and all of the local ABC affiliates' sites) and each of those distributors has its own unique terms (including financial arrangements, frequency of a program airing or time an episode can be shown, etc.). We manage that complexity and ensure they get their fair share in the revenue stream." ■



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Distributors Tap Africa As Top Emerging Territory

This year marked the inaugural edition of DISCOP Africa, the sprawling continent's first major content market, that took place February 25-27 in Dakar, Senegal (see related story on pg. 38). With the maturing of DISCOP East, which takes place in Budapest, Hungary in June, "emerging markets" seem to be the buzzwords on everyone's lips lately.

In fact, companies from all over the world are so full of expectations about breaking into emerging markets that a second DISCOP Africa has been scheduled for later in the year. But what does the term "emerging markets" actually mean for distribution companies, and which of these up-and-coming territories are they most focused on?

Eric Muller, London-based Power's Sales manager for Central and Eastern Europe (CEE) and Africa, noted that his company has been doing business in the CEE region for years. For this reason, he doesn't consider it to be an "emerging market" any more. Thus, Muller and company have turned their attention to Africa, which, TV-wise, is still very much an uncharted territory. According to Muller, "more or less the whole world has been covered [by the

TV biz], and Africa, due to its political instability, is the last region left."

As such, Power was out in full force at DISCOP Africa, where, as Muller put it, he and his team were "keen on helping and supporting the market, and of course, looking for buyers." Muller is confident that the result of DISCOP Africa will be the opening up of the African market, even more than DISCOP East helped to bolster the industry in CEE. "DISCOP East worked for CEE," he said, "Because it helped bring in countries like Bulgaria and Romania that were difficult to access otherwise. But the need for DISCOP Africa is much greater."

Additionally, Muller said that the timing is perfect for an African TV boom. He explained that fiber optic cabling has finally reached a workable level in many countries, which will help bring TV to wider audiences. Perhaps most importantly, he remarked that Barack Obama's election in the U.S. has gone a long way in creating a sense of optimism and "a synergy from all over the world," that has brought people together in the common pursuit of establishing a modern African entertainment industry.

Similarly, John Vandervelde, svp of Business Development and International Co-production for Toronto-based Cookie Jar, said his company also considers Africa to be the next frontier. While Cookie Jar's biggest international business still comes from Western Europe — especially the U.K., Germany, Spain, Italy, and France — Vandervelde explained that South Africa has done a lot to attract foreign TV distributors. "We are co-producing in South Africa right now," he said, "And we're pretty excited about the things the government has done to grow the TV industry. We're also excited about getting the opportunity to help trigger that growth."

To attract companies like Cookie Jar, South Africa's government has enacted a variety of tax incentives, including the Location Film and Television Production Scheme and the South

African Film and Television Production and Co-Production Scheme. These programs give 15-35 percent rebates to productions with budgets over U.S.\$1.5 million.

It is programs like this, more so than DISCOP Africa, that have Vandervelde and company excited about doing business there, and Cookie Jar was not even in attendance at the Dakar event. For now, Vandervelde said his team is focused on their co-productions, but if DISCOP Africa turns out to be a must-attend, they'll be there.

Michelle Wasserman, head of Sales for Argentina's Telefe, stressed: "The whole world is important. Small countries and big countries, emerging and not." That said, Wasserman went on to explain that Telefe does most of its business in Latin America, the U.S. and Europe, but is very interested in branching out to other territories.

Where Africa is concerned, Wasserman said Telefe was excited about "increasing our presence in the region" through DISCOP Africa. "We've done some deals in Africa in the past," she added, "But Telefe's never really given the territory a serious look until now." Wasserman went on to outline some of the changes the company has made to refocus its energy on Africa, including creating a position for a Sales executive devoted solely to the region.

On the other hand, Wasserman, like Power's Muller, pointed out that the "emerging market" moniker could no longer be applied to Eastern Europe. "It's not an emerging market for us, but a main and very important one," she said. "It's our most important income source, and we've been working hard there since Telefe's beginning."

New York-based AETN International was not in attendance at DISCOP Africa, but that doesn't mean it's not interested in the continent. Michael Katz, vp, Programming and Production, said that his company is interested in "just about all the international markets



Telefe's Michelle Wasserman

in the world," including Africa. "Most of our African business is currently in the Sub-Saharan region," Katz said, adding that he hopes AETN will be able to work with countries besides South Africa in the near future.

Regarding Eastern Europe, Katz noted that his company has been doing business there since 2003 or 2004. In fact, the firm recently assigned an executive to the CEE region, much like Telefe did in Africa. He went on to remark that AETN programming works well all over the globe, due to its "broad palette of factual content."

Sub-Saharan Africa is also the next frontier for Miami-based Telemundo, according to executive Karina Etchison, who will be using MIP-TV to try to sell its novelas to South Africa.

Though the overall consensus among the executives interviewed seemed to be that Africa is the hot emerging territory, it is by no means the only up-and-coming market that distributors will be focused on at MIP-TV (see related story on page 20). Firms such as Munich, Germany-based Studio 100 will also be zeroed in on buyers from such territories as the Middle East and Asia, a goal that appears to be perfectly in sync with MIP-TV's conference program. Among this year's seminar offerings are several panels addressing the on-the-rise industry in the Middle East, including "Middle East Market Overview" and "Middle East Television Co-Production Opportunities." China, as the theme of this year's market, will, obviously, be another sought after territory. However, coming off the momentum of February's Dakar event, it will be difficult for other regions to top the buzz surrounding Africa. **ES**



Cookie Jar's John Vandervelde

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Witnessing The Birth Of Many TV Nations

BY BOB JENKINS

The inaugural DISCOP Africa pulsed with a beat that was both African and optimistic. *VideoAge* attended all three days of the Dakar, Senegal market to discern why it seems like Africa's day has finally dawned, what the market looked like, what programming was hot and how much one can expect to be paid for content.

In the eyes of many executives interviewed for this story, the arrival of DISCOP Africa marked the recognition that a new day is dawning for the African audiovisual business.

Let's start with the figures: The 437 delegates attending the market, including 170 buyers from 36 different countries, and representing 29 public channels, 62 private channels and nine pay-TV platforms, greatly exceeded the expectations of the organizers — Paris-based Basic Lead in association with NATPE of Los Angeles.

Let's now move to the facts: The first day of the market, on February 25, was dedicated to a series of panel discussions and debates addressing some of the key issues facing the continent's audiovisual business, as well as providing fascinating insights as to where the business in Africa is right now.

Russell Southwood of U.K.-based technology company Balancing Act provided some revealing insights as a result of a study his company recently carried out. Overall, penetration of television sets in Africa is low at 17 percent. However, as might be expected of a continent the size of Africa, this bald statistic hides a wealth of differences. South Africa accounts for 16 percent of all the sets on the continent and the wealthiest 15 markets between them claim 75 percent of the continental total. Despite these figures, one of the impetuses behind the perceived potential is in fact technology — digital is arriving in a big way. There has been a huge explosion in the number of satellites and in the very near future the whole of the continent will be wired. Indeed, Euan Fannell, CEO of Kenya's Wanachi Group, told the delegates that his company is close to completing the building of a three

terabyte (capacity) cable along the whole of the African East coast, and plans soon to introduce Africa's first triple-play offer: Internet, HDTV and VoIP. Eventually, he hopes that the service will have 91 channels offering African, English and Asian content. And this is in Kenya, a country that already boasts 16 broadcasters.

This story of growth is one that is repeated all over the continent. And it is not difficult to see why. Bernard Azira, director general of Ivory Coast distributor Cote Ouest, by far the largest in West Africa, representing MGM, Disney, Sony Pictures Universal and Brazil's TV Globo, estimated that, "as a result of the arrival of digital, it is now possible to start a station in the region for around U.S.\$200,000." And while some problems do remain, especially piracy, which Azira described as, "like AIDS, cancer and Parkinson's all rolled into one for this business," Balancing Act's Southwood believed some positive signs are apparent in this regard. He pointed to the recent seizure of equipment from Lagos-based broadcaster Multimesh by the authorities in Nigeria. And he went on to insist it be put in perspective. "The Cable And Satellite Broadcasting Association Of Asia," he pointed out, "put losses to piracy for 2007 at U.S.\$1.5 billion, excluding China, far less than any figure for Africa. So, if African figures scare you," suggested Southwood, "maybe you would be

better off just staying at home."

So what is this booming African market looking for, and how much will it pay for it? Overwhelmingly, the most popular content is sport, and for most of Africa, this means football (soccer). For the most recent deal involving the English Premiere League, Nigeria paid a reported U.S.\$28 million for one season. But Southwood estimated that, "as a general rule, prices vary between \$300-\$500 per hour, with exceptional premium product going as high as \$2,000 per hour." He put this into context, estimating the production cost for South Africa's morning TV show as \$7,000 per hour, a one-hour primetime drama in Kenya costs around \$10,000 per hour, and a Namibian soap comes in at around \$13,000 an episode.

Other than football, the most popular genre on a continent-wide basis is the telenovela, although Daro's Pierre Rochat, whose Monte Carlo-based company represents Fox, the BBC, TF1 and CBS in the region, said that, "any series or movie with a black or predominantly black cast will sell well continent-wide, and that sitcoms are definitely making a comeback after a period when they fell out of favor." Another genre Rochat fingered is animation. "There is a big demand for animation," he insisted, adding, "which we are well placed to serve as we also represent Canada's Cookie Jar, which, following its recent acquisition of Los Angeles-based DIC, is now a very big Cookie Jar indeed!"

British subject Bill Peck, consultant to Star Media Group Russia, also reported a strong demand for documentaries at the market, especially historical ones, adding, "I have been very impressed with the sophistication of the buyers I have met here who are definitely only interested in the highest quality content." Peck also went on to praise: "the first rate organization of the market itself, and the intimate, family atmosphere it generated."

However, while Rochat said that Africa, with the sad exception of South Africa, is likely to escape the worst, if not all, of the consequences of the current economic downturn, it will be a while before the continent is in a position to do very much in the way of formatting. "Formats," said Rochat, "are difficult. Not impossible, but difficult because not many broadcasters can really afford them."

One of the ways in which content suppliers have sought to overcome problems arising from broadcasters' inability to pay for programming has been barter, but this is a system that now divides opinion starkly. Although still prevalent, there are those that consider it is too addictive and that broadcasters have a tendency to become dependent on "free programming."

However, the optimism was so palpable at the inaugural DISCOP Africa that virtually all of the channels were talking in terms of local production. In this regard, Africa is just like the rest of the world and local tends to be more popular than acquired content. In the panel sessions some of the pay operations were even talking of localizing the most popular content in Africa, football, by investing in building the local leagues and developing the undoubted talent to produce players of international standing that are playing in Africa.

It is true that it is still early days for the African audiovisual industry, and that much remains to be done, and there is great potential for pitfalls along the way. But it was difficult to leave Dakar at the end of the first DISCOP Africa without a sense of optimism, and also of anticipation for the second DISCOP Africa, slated for Nairobi, Kenya 16 -18 September '09.

However, the question remains: Why now? After all, Africa has been here for considerable time, so what has changed to make "now" the moment for the continent to finally realize its potential? One answer could be that Africa is a continent rich with natural resources and equally ready to take advantage of that wealth. But the caveat is that all that richness is also generally referred to as the region's "commodity curse." **BJ**



African buyers at the DISCOP market

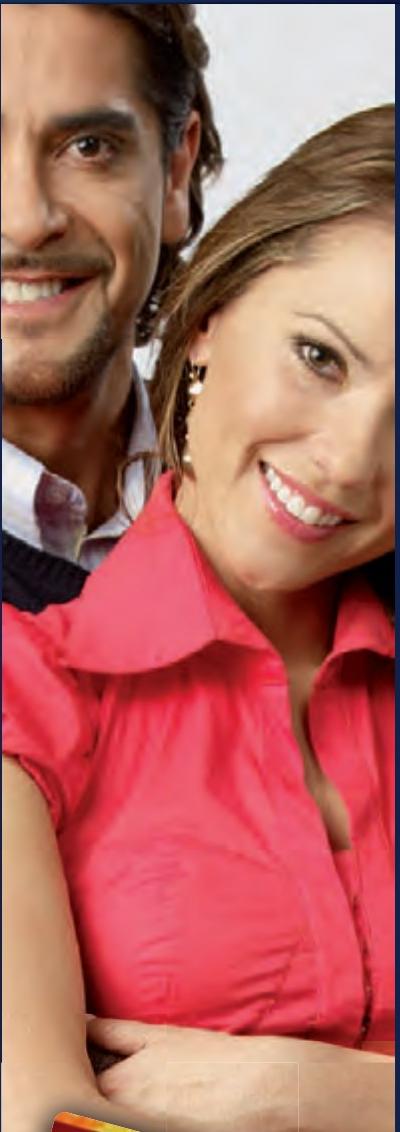
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Channel Hopping in Europe

Survey Reveals the Growth of TV Networks on the Old Continent

After the U.S., the European market is the world's second largest TV market and one of the cornerstones of the international television business, generating billions of dollars in revenue, spending a few billion more for acquisitions and creating thousands of hours of programming every year. Yet few people grasp the actual scope of the region's TV industry. Perhaps the confusion about the labels "Western," "Central" and "Eastern Europe" make it difficult to delineate its exact borders. Or maybe the confusion stems from the agonizingly bureaucratic European media-gathering organizations (which receive public European Union, EU funds, but are skilled in staying off the radar, lest the public realize how useless they are), or the fact that, until recently, there was no centralized database providing easy access to facts about the size, nature and history of the business in various European countries. Fortunately, a tool has come along to help answer questions like: How many TV channels are there in Europe, who are the leading broadcasters and how fast is digital TV catching on across the continent?

All the stats on TV in Europe that one

could hope for are now available in a single online database. The database, known as Mavise (www.mavise.obs.coe.int), was set up by the Strasbourg, France-based, European Audiovisual Observatory (EAO) at the request of the EU's European Commission. Founded in 1992, the EU-financed EAO is an organization dedicated to gathering, archiving and distributing information about the audiovisual industry in Europe.

Mavise contains searchable statistics (gathered in 2007) on the TV industries of all 27 countries of the EU as well as two candidate countries (Croatia and Turkey), throughout which there are 23 official languages. This includes information on thousands of channels and audience figures care of — as it is officially noted — French audience measurement institute Médiamétrie (which, despite its presence at various TV markets like MIP-TV, is a mysterious organization to *VideoAge*). Also available are facts on the history of TV in each country. The archive will be updated in 2011, and periodically thereafter.

In all, Mavise reports that there are 6,500 TV channels in Europe, of which 5,068 are said to be "active." That number refers to stations that program individual channels (therefore no channel repeaters

are included), and encompasses broadcast, satellite and cable channels. The site examines three aspects of each channel: key data about the channels themselves, information about the different audiences, and data concerning companies' finances (extracted from an international database consisting of trade documents).

Though it's easy to get overwhelmed by the wealth of data on Mavise, another useful aspect of the site is that it facilitates a comparison of the markets of different countries and illuminates continent-wide trends. For example, one of the most notable developments across Europe is the declining viewership of free terrestrial TV channels as a result of the proliferation of other television options.

The following is an overview of television statistics from the five European countries with the largest TV audiences and biggest markets: Germany, the U.K., France, Italy and Spain. Of those five, Germany has the highest number of total TV households and constitutes Europe's largest market. However, some of the smaller countries, including Italy, have a higher ratio of TV households to population, making them equally important. **ES** ●

Mavise also lists the number of channels based on their genre. Below is a sampling:

General: 376
Movies: 333
Sports: 324
Entertainment: 269
Music: 238
News and Financial: 201
Children: 189
Documentaries: 135
Lifestyle: 110
Shopping: 103
Cultural/educational: 69
Travel and vacation: 26

Another of Mavise's helpful features is that it provides the breakdown of terrestrial, cable and satellite channels across Europe. An overview of these figures follows:

4,663 channels are based in the 27 EU countries and the two candidate countries.

404 channels are located in non-EU European countries.

The 4,663 EU channels are divided into 381 national terrestrial networks and 2,473 cable, satellite and IPTV channels. Of these, 656 cover more than one country. One thousand eight hundred and nine are regional and local channels.

Germany

Population: 82,218,000
Household with TVs: 39,981,000
Households with digital TV: 15,460,000
Number of channels based in the country (broadcast and satellite): 398
Biggest broadcaster (in terms of audience share): ProSiebenSat1
Leading pay-TV provider: Kabel Deutschland, 9.5 million subscribers
TV ad revenues per year: \$13.2 billion*

U.K.

Population: 60,975,000
Households with TVs: 26,500,000
Households with digital TV: 21,983,000
Number of channels based in the country (broadcast and satellite): 940
Biggest broadcaster: BBC
Leading pay-TV provider: Virgin Media, 3 million subscribers
TV ad revenues per year: \$14.7 billion

France

Population: 63,753,000
Households with TVs: 26,495,000
Households with digital TV: 20,810,000
Number of channels based in the country (broadcast and satellite): 438
Leading pay-TV provider: Canal+, 10.5 million subscribers
Biggest broadcaster: Not provided by the Mavise report.
TV ad revenues per year: \$9.8 billion

Italy

Population: 59,131,000
Households with TVs: 23,907,000
Households with digital TV: 6,300,000
Number of channels based in the country (broadcast and satellite): 382
Biggest broadcasters: RAI (public) and Mediaset (private)
Leading pay-TV provider: Sky Italia, 4.6 million subscribers
TV ad revenues per year: \$8.8 billion

Spain

Population: 45,283,000
Households with TVs: 15,919,000
Households with digital TV: 12,178,000
Number of channels based in the country (broadcast and satellite): 379
Biggest broadcaster: Telecinco
Leading pay-TV provider: Sogecable, 2.08 million subscribers
TV ad revenues per year: \$2.72 billion

*Information on TV ad revenues gathered from sources other than Mavise.

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He Who Smiles In a Crisis Has Found Someone to Blame

Comedy is not just fun on television, it's also becoming an important ingredient on the convention circuit as well. At last year's MIPCOM, market organizers introduced the comic element into one of the seminars by having a creative keynote from American performer Ze Frank, who is a comedian and presenter.

To assess the importance of a comedic element at TV trade show seminars, *VideoAge* conducted a straight talk with Kevin Carroll who, as a comic, has hosted and moderated some 250 seminars.

The 52-year-old Connecticut-based Carroll started his career working for a New York ad agency. As Carroll told *VideoAge*, "it was one of the happiest days of my life." He left the advertising business 17 years later, and again, "it was one of the happiest days" of his life. After exiting the advertising business, Kevin tried standup comedy and was encouraged by others to leave that career as quickly as possible. Since 1996, he has built his own speaking,

training and consulting business. Today Carroll works with blue-chip companies such as GE, Cisco Systems and Unilever. His job is to teach his clients how to "think creatively and communicate persuasively". When not speaking or training, Kevin has the enviable job of poking good-natured fun at corporate executives with his shamefully funny customized comedy roasts.

VideoAge International: What is the difference between having a comic moderator vs. TV industry veteran or a journalist?

Kevin Carroll: Comedy is emotional, the other is intellectual. People are first and foremost emotional beings, so humor is going to be more powerful. Comedy can make people *want* to listen...not *have* to listen. Just look at the Academy Awards, humor is a key component of any Oscar night. The best solution may be to have a combination of humor (from the moderator) and straight talk (from the speakers).

VAI: Is it important to have a separate seminar making fun of the international

TV industry, or is it sufficient to do it during one that the comic is moderating?

KC: If the conference is all about the international TV industry, then by all means, integrate the comedy throughout the entire program. This way you can poke fun at so many aspects of the industry (executives, actors, programs, ratings, viewership, production, media).

VAI: Can a seminar be interesting if it is boring?

KC: Let's reverse that question...can something be boring if it's interesting? Nope. The only exception I can think of is [American comedian] Steven Wright who is interesting *because* he's boring (although his content is brilliant). Maybe the question should be, can a seminar be interesting even if it doesn't use humor? If that's the case, then I'd say yes it can, however it better have lots of creative "hooks" throughout. You want to make sure that the moderator and speakers have incorporated stories, analogies, props, surprising statistics, powerful visuals and more.



Kevin Carroll

VAI: In your experience, do TV executives enjoy laughter? Since everyone seems afraid of making a mistake in this corporate environment, are TV execs really able to enjoy themselves?

KC: Everyone enjoys laughter and TV executives are no exception. (OK, maybe there's a few out there who have Darth Vader-like tendencies, but *they* are the exception.) When times are difficult, laughter is needed most. Years ago I met an attorney who had worked for an insurance company for 30 years. He told me that he never enjoyed one day of his job. How sad is that? If someone is so afraid of making a mistake then they either need to find a different line of work or they need to learn to get more comfortable with risk.

VAI: In your view, is there any show left in show business, or is it only business?

KC: When the "show" goes out of the business, the business will take a nosedive. I make my living coaching clients on how to give speeches and presentations that wow an audience (with both the content and the delivery). Everyone needs to learn to put a little more "show" in their business if they want to survive.

VAI: At seminars, is it better to laugh in the morning or in the afternoon?

KC: Humor is a miracle drug. It can kick start a meeting and sustain attention throughout the day. I suppose if I had only one choice, I'd say hold off on the humor until the end so that everyone is energized and leaves on a high.

So, in conclusion, advised Kevin Carroll, there are at least five benefits for including humor in a presentation:

- It engages audiences.
- It makes audiences more receptive to your message.
- It helps people understand concepts better.
- It helps people remember things more easily.
- It helps persuade people.

Kevin Carroll is the author of Think Outside Your Blocks and the co-author of Make Your Point! Kevin also recently invented a family game called Pickles to Penguins, which will be launched by Imagination Entertainment in 2009.

Below is an excerpt from Carroll's soon to be published book, *What's Your Hook?* (published by Second Avenue Press).

It talks about how to weave humor into a presentation.

Many people mistakenly believe that "humor" means the same thing as telling jokes. While joke telling is a form of humor, there are lots of other types of humor that can work just as well (if not better) and that you can feel more comfortable with. The list includes: funny newspaper articles, humorous trivia questions, amusing bumper stickers, cartoons, outlandish photos, top 10 lists, embarrassing moments, entertaining anecdotes and (if all else fails) puns. There are three criteria I apply when deciding whether or not to use humor in a presentation.

Is it funny? Is it in good taste? Does it relate to the topic I'm talking about?

Keep in mind that rather than trying to be 'funny,' you're better off just trying to add some 'fun' into your presentation. It's a lot easier making something fun rather than trying to be funny.

Here [below] is a short list of some things I've used in past presentations to add levity. I didn't come up with these ditties myself. They were either sent to me or I found them on the Internet. As you come across funny doodads similar to the ones you see below, save them in your keepers file so that you can pull them out whenever you need them. They're perfect for sales meetings, brand reviews, conferences, team meetings, and project kickoffs.

Mock Motivational Quotes

"Before you criticize someone, you should walk a mile in their shoes. That way, when you criticize them, you're a mile away and you have their shoes."

"Always remember you're unique, just like everyone else."

"He who smiles in a crisis has found someone to blame."

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Laughter Is Back

(Continued from Cover)

scripted roster, NBC is something of a comedy juggernaut. However, like most major U.S. studios, it took a hit last year when the writers' strike halted production smack in the middle of development season. As a result, company president and CEO Jeff Zucker swore off pilot production and downsized plans for new series.

Fortunately, after a rocky 2008, NBC's comedy machine is back in full swing. Jeff Ingold, senior vp of Comedy Development for the network, was optimistic about the new year, pointing out that TV audiences in the U.S. are up from last year and the numbers for NBC's primetime comedies have increased as well. Ingold attributed this rise in viewership to a variety of factors, including the end of the reality show boom. "We hit a wall with reality shows," he said, "People turning back to scripted programming is a course correction." Additionally, Ingold noted that both his company and its biggest comedy competitors have experienced larger audiences since the economy took a nosedive. "CBS has had a nice boost this year, with *How I Met Your Mother* and *Two And A Half Men*, which could be due to the economy," he said.

Where new series are concerned, Ingold said that although pick-ups are still going on, NBC has already acquired four new comedies that will debut later this year. Ingold explained that in terms of pilot acquisitions, he and his team have been on the lookout for recession-friendly fare. "We're trying to stay in touch with what's going on across the country," he said, adding that this means "staying on the positive side of things."

NBC's first new series to hit airwaves is *Parks and Recreation*, a mockumentary-style sitcom featuring *Saturday Night Live* alumnus Amy Poehler as a small-town bureaucrat. The show premieres April 9, and will initially run for six episodes. Ingold also highlighted *Community*, a comedy following the lives of students at a community college, which will air this fall. Overall, Ingold summed up the net's new series as "escapist and fun with a touch of romance, and above all, character-driven."

Across the pond, London-based ITV Global is hard at work whipping up comedies for both the U.K. and Australia. "Feel-good television is definitely in demand," said Emmanuelle Namiech, the firm's director of Acquisitions and Co-



Gene George of Starz

productions. To cater to this demand, ITV is producing "cool but easy-to-grasp comedies," including series *FM*, which will debut at MIP-TV. The series, which was commissioned by ITV2, follows the antics of the staff at a radio station.

Regarding general trends, Namiech pointed out that political satire is experiencing a resurgence. ITV's CGI-animated sketch series *Headcases*, which is made up of grossly exaggerated send-ups of political figures and celebrities, has recently been very successful in the international market. In addition to reflecting the public's dissatisfaction with world leaders in the face of the financial collapse, Namiech also noted that the program's appeal may have something to do with the fact that it's "short, snappy and focuses on really well-known people."

Coincidentally, Los Angeles-based Starz Media will be at MIP-TV pushing the similarly named *Head Case*. Much like its British counterpart, the Starz series pokes fun at big name celebrities. Gene George, the company's evp, Worldwide Distribution, summarized the show as "a semi-scripted series about a psychiatrist to the stars featuring real-life celebrities playing themselves."

George went on to say that, since first dabbling in comedy last year, his company is now determined to carve out a niche in what he referred to as "the half-hour comedy space." In order to do

so, Starz is launching its first fully scripted comedy, *Party Down*, a show about two Los Angeles cater-waiters trying to break into entertainment. Additionally, George and company produce two comedies, sketch show *The Whitest Kids U Know* and semi-scripted *Z-Rock* for the IFC channel.

Of the recession, George pointed out that the theory that the industry stands to benefit from the crash holds water. "TV is the most cost effective entertainment alternative right now," he said, "And people like to escape to comedy."

New York-based Lightworks Program Distribution has its own semi-scripted celebrity comedy series set to air in Canada. *Out There With Melissa DiMarco*, much like Starz's *Head Case*, satirizes the world of Hollywood actors. The show, which will soon debut on Canada's Citytv, focuses on real life entertainment journalist Melissa DiMarco as she interacts with celebs on the red carpet and struggles with her personal life.

DiMarco, who in addition to being the show's star also writes and produces the series, explained that *Out There* is just the thing for hard times. "It's a good time for light story lines and comedy," she said. She went on to explain that the show's basic premise — gently debunking the mystique surrounding celebrity — could be very appealing to people feeling the crunch. "What the show demonstrates," she said, "is that celebrities are just like everyone else."

John Cuddihy, president and managing director for Lightworks, noted that in addition to its satirical elements, the show's biggest draw is DiMarco's talent. "What makes this show so attractive," he said, "Is that Melissa has a unique way of engaging these stars — and these are all A-listers — and making them be fun." Cuddihy also alluded to forthcoming international distribution deals outside of Canada, but could not disclose any details. He hopes to close these deals at MIP-TV.

Even distributors who usually stick to factual programming are getting in on the comedy game. Los Angeles-based



Emmanuelle Namiech of ITV

Rive Gauche, which, for the most part, specializes in documentary and reality series, is seeking out chuckles with its new series *Scare Tactics*. Dorothy Crompton, the firm's svp of International Sales will be at MIP-TV pushing the series, which centers on elaborately executed pranks incorporating supernatural occurrences. "Reality programs are great," she said, "But it's really the comedic twist that sets *Scare Tactics* apart."

Despite the widespread optimism that the recession will usher in a golden age of comedy, some industry professionals are still insistent that there is no relationship between the state of the economy and the popularity of TV comedy. Herb Lazarus, president of Santa Monica, California's Carsey-Werner, which distributes an impressive catalogue of syndicated comedies, remarked that he has yet to see any correlation between the programming biz and the economy. "The recession is not going to affect a certain genre," he said. He added that all TV is "light entertainment," and he doubts that broadcasters will favor comedies over dramas as a response to glum audiences. As for new comedy programming, Lazarus said there will always be a place for the kind of quality shows like *The Cosby Show*, *Roseanne*, and *That '70s Show*, that eventually make their way to Carsey-Werner's roster.

Overall, however, TV's laugh-makers seem to be in agreement that the time is ripe for good comedy. Where trends are concerned, satire targeting the rich and famous promises to be in abundance in '09, along with semi-scripted series. However, ITV's Namiech may have summed it up best when she said, "Any type of comedy goes right now, although I have yet to be offered a sitcom about investment bankers." ●



ITV series *Headcases*

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Pellicioli's Overnight Success

(Continued from Cover)

Communications operates in: content production and distribution with Paris-based Zodiak Entertainment; broadcasting with Madrid-based Antena 3 and film distribution with Milan and Rome-based Mikado Film.

The international TV sector first met Pellicioli briefly in 1984, in Milan, when from an advertising sales management position, he was appointed general manager of Rete 4, the Mondadori Publishing Group-owned TV network.

That same year, Rete 4 was sold to Silvio Berlusconi and Pellicioli disappeared from the international TV industry radar. Pellicioli made a blip on the TV industry radar screen in the year 2000 when, as a manager of De Agostini (where he served since 1997), he attempted to create a third TV pole in Italy, with Tele Monte Carlo (now called La7) to compete with both Berlusconi's Mediaset and state-owned RAI. Pellicioli abandoned the project in 2001 when Tele Monte Carlo's majority shareholder, telephone giant Telecom Italia, was sold to Marco Tronchetti Provera, a Berlusconi ally.

In 2003 Pellicioli's blip became a bigger dot on the TV radar screen when the Spanish-Italian joint venture Grupo Planeta-De Agostini acquired 44.58 percent of Madrid-based TV network Antena 3. Subsequently, in 2007 and 2008, the blip expanded into a solid circle when De Agostini Holdings — where Pellicioli has served as CEO since 2005 — through its De Agostini Communications, got into a U.S.\$400 million international TV shopping spree in Italy, France and the U.K. Under Pellicioli, De Agostini Holdings has morphed into a financial conglomerate with international interests in publishing, gaming, financing, media



Laurent Boissel, CFO, Zodiak Entertainment



Giorgio Gori, co-founder and CEO, Magnolia Group and svp, Light Entertainment, Zodiak Entertainment

and communications. But let's see what Pellicioli had to say.

VideoAge International: You described De Agostini as a "financial conglomerate." What does this mean?

Lorenzo Pellicioli: It means that De Agostini S.p.A is a holding company that coordinates the activities of the operating companies (De Agostini Editore, De Agostini Communications, Lottomatica and DeA Capital), which are active in different strategic sectors, while also making financial investments. De Agostini Editore is the sub-holding company for the Group's editorial activities. It operates in 30 countries and publishes in 13 languages. De Agostini Communications is the sub-holding company for the Group's interests in activities such as content production, broadcasting and the distribution of content for television, new media and cinema. Following its acquisition of [U.S. game technology specialist] Gtech, Lottomatica has become the largest international player in the lottery, games and related services sector. Finally, DeA Capital makes private equity investments and is active in alternative asset management.

VAI: Your companies produce films, TV dramas, reality shows, documentaries, children's TV programs and licensed formats. How do you expect to create synergy? Is there a coordinating division?

LP: Made up of over 20 successful international companies, Zodiak Entertainment produces more than 5,200 hours of programs each year for television and other media, broadcasts over 200 shows in various countries and has over 300 client channels. The coordination of these companies and the creation of internal synergy are achieved through two main tools: distribution and creativity. These two areas will be managed centrally by Zodiak Entertainment to create synergy. In the first one, in particular, which dates from January of this year, the distribution chain will be centralized to facilitate the offer and sale of our products on a global scale.

VAI: One difference between U.S. companies and European companies is the level of bureaucracy. Even Sky-Italia operates like a post office. Is De Agostini different?

LP: I know both sides of the ocean pretty well, and in my experience I have always found much more bureaucracy in American companies than in European ones. I really think that American corporations have cumbersome procedures that make them unfit to cope with a crisis such as the one we are experiencing. As regards Sky Italia, I think that their excellent results are self-explanatory. I don't know if De Agostini is different; anyhow De Agostini S.p.A acts as a financial holding company, intervening mainly to define the strategies of the various sectors of activity or to allocate financial resources, to define the level of debt to be respected and to monitor M&A activities. However, it does not interfere in actual business, but rather ensures that the plans and expected results are respected. In particular, as far as our "media content" sector is concerned, we have chosen to apply a "federal government" model: the main role attributed to Zodiak Entertainment will be one of central coordination and control, and of generating creative momentum to encourage the circulation of ideas within the field of the companies operating in the various countries. The latter, on the other hand, will be responsible for individual productions and relations with local broadcasters.

VAI: Your companies are strategically located: Spain (with a view on Latin America), France (Africa, Canada), U.K. (English-speaking countries), Russia (Eastern Europe), etc. Was this part of a precise design or simply a matter of opportunity?

LP: No, it is only the result of our acquisitions. Now we have to rationalize the organization.

VAI: What is missing for you to become a studio?

LP: I am not sure we want to become a studio. We want to remain something quicker and more focused.



Patrick Svensk, CEO, Zodiak Television Group and svp, Business Development, Zodiak Entertainment

VAI: In an interview, you said that, in the past, it was important to have distribution (shelf space was imperative). Today, digital technology makes content more important. Does this mean that you don't believe in broadband?

LP: In the audiovisual sector, the arrival of digital technology has generated a huge number of platforms and channels, shifting the value from distribution more to product and from network more to programs. Those operating in the media world cannot ignore this trend. Thus, in terms of investment priorities, it is more logical for us to climb to the top of the value chain by concentrating on content rather than distribution. Anyhow, broadband has a great future but we, as content producers, need not to worry about the medium but about the users of that medium.

VAI: What is your view of IPTV?

LP: Let's wait and see. For the moment I don't see any convincing business model. We are testing something new, using content based on the "know-how" and "knowledge sharing" that is already available from De Agostini Editore.

VAI: What are your future plans?

LP: Today, with Zodiak Entertainment, we are the only group in Europe with proven strength in all four genres of television production: entertainment, animation, fiction [drama] and documentaries. Zodiak Entertainment's main objective is to combine organic growth with other acquisitions and to strengthen our position in Great Britain, the United States and emerging markets. With this strategy, we aim, over the next three years, to become one of the main international players in the content market, with a turnover of 800 million to 1,000 million euro and an EBITDA of 130 million to 150 million euro. If we achieve these objectives, we will also be able to list Zodiak Entertainment on the stock exchange.



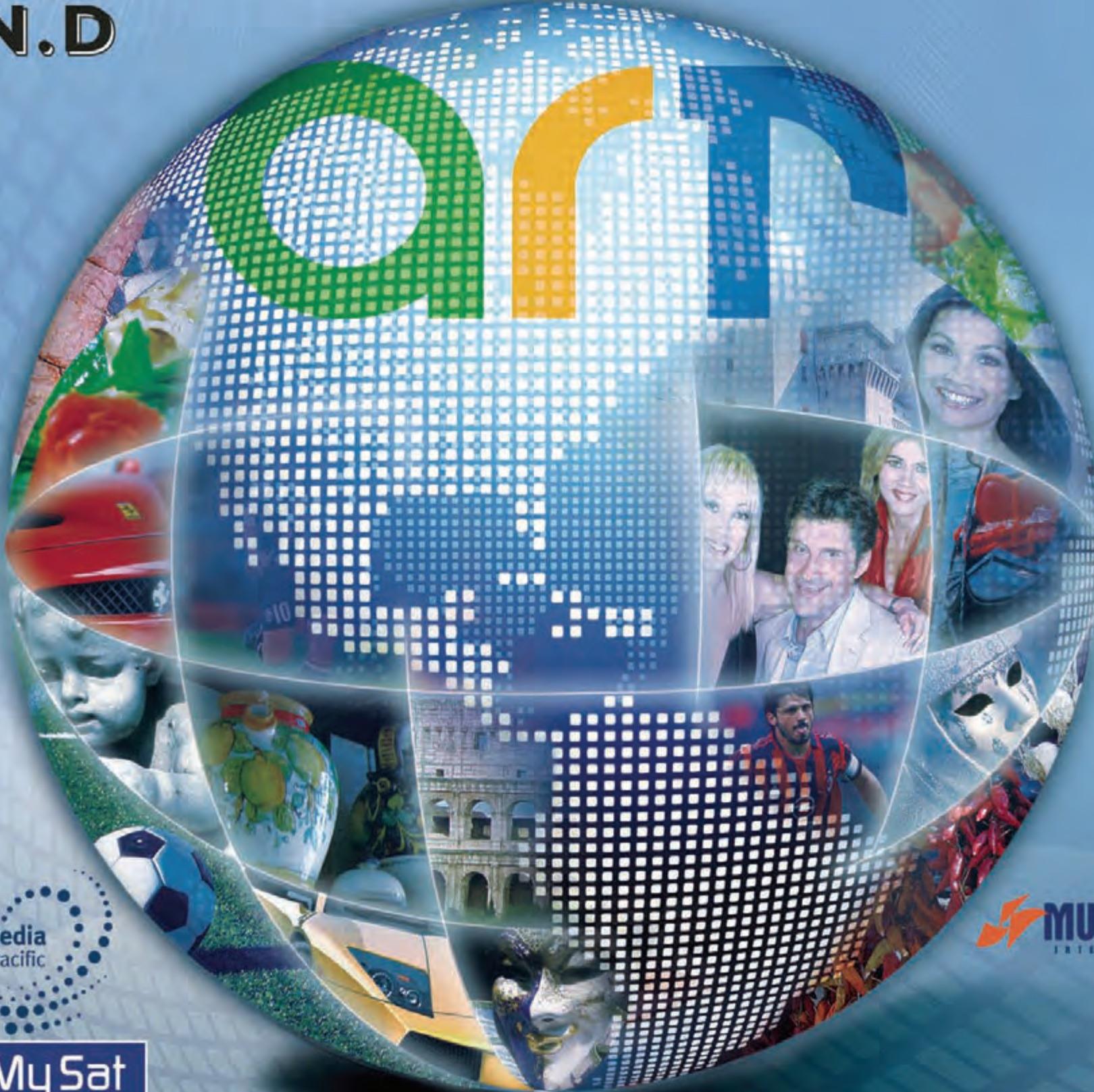
Pascal Breton, founder and CEO, Marathon Group and svp, Fiction (drama), Zodiak Entertainment



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Pellicioli's Overnight Success

(Continued from Page 46)

All Under One Umbrella

Last November in London the creation of the Paris-based Zodiak Entertainment was announced, grouping De Agostini Communications' three key content providers: Magnolia Group, Marathon Group and Zodiak Television Group, under one umbrella. President and CEO of Zodiak Entertainment is Lorenzo Pellicioli.

Magnolia Group

Magnolia Group was founded in 2001 in Milan, Italy, by Giorgio Gori, Ilaria Dallatana and Francesca Canetta, all former executives at Mediaset. De Agostini Communications acquired 53.5 percent of the group in 2007. Gori is Magnolia Group's CEO and svp, Light Entertainment, Zodiak Entertainment. Magnolia's key offices are in Milan and Rome.

In Italy, it controls the following companies:

- NeoNetwork: Formats for interactive TV
- Quadrio: Production company for infotainment, game shows
- Milanorama: Production company for docu-reality
- Magnolia Fiction: Drama production
- Magnolia International Distribution

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Zodiak Television Group.

Information about the company's origins is sketchy. It is unconfirmed that it was founded in 1980 in Sweden. The name of its founder(s) is unknown. Also unknown is when the company moved its main operating base to London.

Patrick Svensk is Zodiak Television Group's CEO and svp, Business Development, Zodiak Entertainment. De Agostini Communications acquired 100 percent of the group in 2008.

Zodiak Television Group controls:

- Zodiak International (U.K.): Content distribution
- Zodiak Distillery: Formats
- Bullseye (U.K.): TV production
- Diverse Productions (U.K.): TV production
- Lucky Day (U.K.): TV production
- Red House (U.K.): TV production
- Yellow Bird (Sweden and Germany): Film, TV production
- Jarowskij (Sweden): TV production
- 5th Element (Sweden): For Web TV and Mobile TV
- Mastiff (Sweden, Denmark, Norway, Ukraine): TV production
- Kanakna (Belgium): TV production

(Continued on Page 50)



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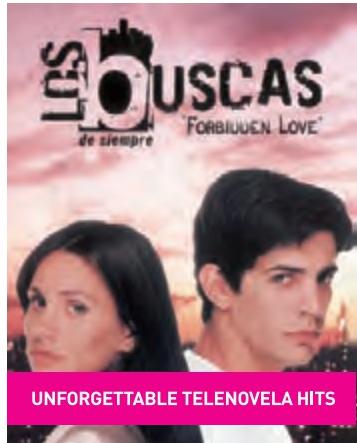
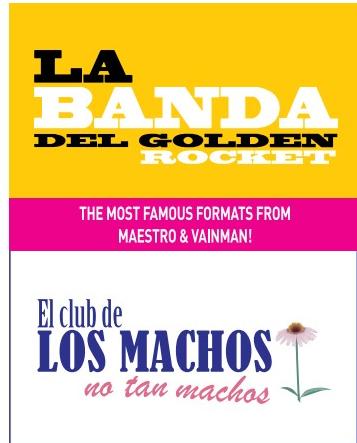
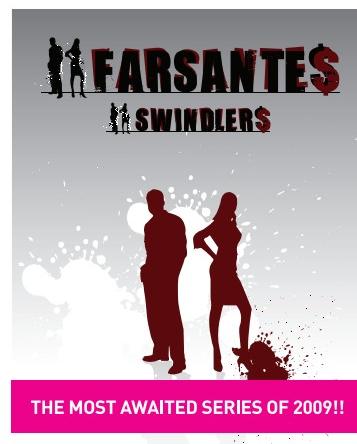
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Pellicioli's Overnight Success

(Continued from Page 48)

- Palm Plus (Netherlands): TV production
- Socal Club Productions (Denmark): TV comedies and film production
- Broadcasters (Finland): TV production
- Mastiff Media (Poland): TV production
- Zodiak Vostok (Russia): Film and TV production. It owns:
 - TeleAlliance Media Group (Russia and Belarus)
 - Dixie Media (Russia)
 - Mastiff Ukraine (Ukraine)
 - YS Films (Ukraine)
 - Sol (India): TV production



Marathon Group

Marathon Group was founded in 1990 in France by Pascal Breton, who is the company's CEO and svp, Fiction (drama), of Zodiak Entertainment. De Agostini Communications acquired 100 percent of the group in 2007.

Based in Paris it controls France's:

- Marathon Fiction: Drama series
- Marathon Media: Animation
- Télé Images: Drama

- Adventure Line Productions: Entertainment, game shows
- Marathon International: Content distribution
- KM Production: Documentaries, entertainment



Vincent Chalvon-Demersay, CEO, Marathon Media Group and svp, Animation, Zodiak Entertainment

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The "View from Howland Canal" is from a watercolor painting by Shelley Lazarus.

For more information, please visit *VideoAge*'s dedicated website at:

www.videoageinternational.com/screenings.html

De Agostini Communications also owns:

— Cattleya Film and TV Production. Based in Rome, it was founded in 1997 by Riccardo Tozzi.

It 2000 De Agostini acquired a minority share. CEO is Giovanni Stabilini.

— Mikado Film (film production and Italian distribution company) was founded in 1984 by Roberto Cicutto and Luigi Musini. Key offices are in Rome and Milan. It was fully acquired by De Agostini in 2007 (in 2002 it had acquired a share). CEO is Alessandro Usai.

— Grupo Antena 3 is a private TV network in Spain. Based in Madrid it was founded in 1998 by a group of four companies. It started regular broadcasting in 1990. A publicly traded group, its CEO is Silvio Gonzales Moreno. In 2003 Grupo Planeta De Agostini acquired 44.58 percent of Grupo Antena3.

— Grupo Planeta De Agostini is a 50-50 joint venture between the Barcelona-based Planeta Corporation and De Agostini Communications S.A. (a Luxembourg-based company owned by Novara-based De Agostini Communications S.p.A.). President of Grupo Planeta De Agostini is Jose Manuel Lara Bosch (president of Planeta), vp is Marco Drago (chairman, De Agostini Holdings).

Grupo Antena 3 owns:
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Movierecord (advertising in cinemas)
A3 Multimedia (Internet, mobile TV)



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L.A. Screenings

(Continued from Cover)



Twentieth Century Fox's Marion Edwards

than-usual L.A. Screenings.

Considering what the international TV sector went through at last year's L.A. Screenings — reduced pilot output due to the Writers Guild of America strike, net executives' desire to do away with the upfronts, the gloom-and-doom mood at the studios and zero parties — working through the Memorial Day holiday, on Monday May 25, could now be considered a privilege. And, if not all U.S. sellers are thrilled with the idea of skipping their family barbecues, buyers have surely mapped out their excursions to the famed Memorial Day sales at Los Angeles' malls.

L.A. Screenings 2009 will be held May 19-29, with the indie screenings taking place May 19-22 and studio screenings May 21-29.

So what do these later Screenings mean for the industry? *VideoAge* checked in with a selection of entertainment biz bigwigs to determine this as well as what kinds of pilots are being produced in Hollywood these days.

"We hate that [the L.A. Screenings] will be over the holiday weekend," said Marion Edwards, president of International Television for Twentieth Century Fox Television Distribution. "We like to leave on Friday, bid the clients farewell and be done with the formal process. Now, the whole weekend will be consumed with Screenings business." When asked why she thought the networks had decided to push their upfront presentations later (which, in turn, pushed the Screenings off), Edwards was unsure. "It could be that they expect to order pilots later and they felt that they needed the extra time," she guessed.

Despite the lateness of the Screenings, Edwards believes that things will be pretty much back to the way they were.

"We will have a more normalized schedule with more pilots being picked up," she said. "Especially after the weirdness of last year." In fact, at L.A. Screenings 2008, few networks had more than half of their development slates at the ready, and had just a handful of finished pilots to showcase.

Yet, while Edwards is certain that many more pilots will be picked up than during last year's upfronts, she's sure that the rather turbulent financial climate will mean more laughs for viewers. "NBC recently picked up four comedy pilots," she said. "So it does seem that networks are looking for comedies, as well as lighter-hearted one-hour shows." Edwards noted that her company is offering such a show in *Glee*, a one-hour musical comedy that follows a high school teacher as he tries to transform a school's glee club and inspire a group of performers that they can make it all the way to the top. Networks, it seems, aren't looking for dramas during these tough times. They're searching for something to get people's minds off their troubles. "None of the shows I've seen seem to be about murder or investigations," said Edwards. "It's much more escapist fare. People are looking to get out of the day-to-day goings-on of their daily lives."

But even if viewers won't be seeing the economic meltdown on their TV screens, that doesn't mean it won't be felt across the board. "I predict that people will be hurting financially due to the downturn in ad revenues," she said. "The strike cost us a lot of time slots that we don't have back yet. Buyers will be cautious. But everyone will be looking for shows that they can turn into hits. And for these, they will open up their purse strings and buy." Edwards added that she doesn't expect to see shows go for record high prices. "I don't think we'll soon return to the days of shooting 25 pilots and only five get picked up," she said. "Nowadays, they'll shoot fewer pilots, but those will have a higher opportunity to get picked up."

Like Edwards, Dermot Horan, director of Broadcast and Acquisitions for Ireland's RTE, is looking forward to what he called a "proper" L.A. Screenings this May. "Last year, buyers went more on hope and got semi-developed slates in return," he said. "Sometimes you got full shows, but more often, you got PowerPoint presentations." Despite this, he managed to pick up a couple of series he has high hopes for: *The Mentalist*, which has already proven itself to be a hit on U.S. network CBS; and *Harper's Island*, which Horan thinks could have a definite buzz about it.

While he's confident that things are finally returning to normal, Horan is none too pleased with the studios' decision to hold the Screenings over the Memorial Day holiday. "For practical purposes having later Screenings is a bad thing," he said. "To go out to the Screenings and not be able to do

anything over Memorial Day, it's a waste of time," he said. He did, however, express the hope that some of the smaller mini-majors would use the time wisely and screen on the Monday holiday.

As for the effects of the economy on the Screenings, Horan was positive that attendance would be down. "We've had a fall in advertising revenue worldwide," he said. "So from that perspective, companies that want to see what's out there will send acquisition executives... but fewer than last year. It will probably only be the core acquisition executives who'll go." Furthermore, Horan is of the opinion that the type of programming that will be offered both at the upfronts and the Screenings will be escapist fare. "People definitely want to be cheered up. They don't want to gorge themselves on doom and gloom," he said. As such, Horan believes that we'll be seeing a glut of entertainment/reality shows a la *American Idol* or *Dancing with the Stars* — shows that Horan termed "inspirational" and "cheery." He also thinks buyers will be seeing more escapist fare of a *Desperate Housewives* nature with protagonists who are easy on the eyes. "People do want a bit of eye candy at the moment," he said.

However, what he doesn't think will flourish once again — despite the credit crunch and the public's appetite for happy news — are classic multi-camera sitcoms. "The best escapism can be in dramas," he said, citing Showtime's half-hour multiple personality romp *The United States of Tara* as the type of darkly funny material he'd like to see more of. "People do want to be cheered up these days, but I don't know that we'll go back to the classic multi-camera sitcom," he said. "[The sitcom is] definitely struggling."

Additionally, since buyers have less money this year, they'll "either buy fewer shows" or the same number of shows that they usually buy but for less money. "We still need to fill our schedules," said Horan.

Horan is also certain that the proposed Screen Actors Guild strike will simply never materialize, and will therefore have zero effect on the Screenings. "It's ill-advised in the current economic climate," he said. "There will be very little sympathy from the public at large. With the writers' strike, a full season was disrupted. This definitely isn't a good time for another strike."

Keith LeGoy, president, Distribution, Sony Pictures Television International (SPTI), concurred, saying he fervently hoped there wasn't another strike in the industry's near future. Additionally, he too believes that comedy is king this time around. "We have certainly seen a big uptick in the number of comedy pilots that we have ordered this year," he said. "Comedy series have been awaiting a revival for a little while now, and obviously we all need to laugh and to be



SPTI's Keith LeGoy

able to escape a little more from the acute day-to-day concerns that we all face. The other thing we are seeing is more comedic and lighter touches in our dramas. If you look at the pilot episode of *The Unusuals*, our ensemble police drama for ABC, or *Drop Dead Diva* for Lifetime, those shows both have great light touches and comedic moments."

Like everyone else, LeGoy is concerned with the state of the economy, and when asked if that worry would affect his company's strategy at the Screenings, LeGoy said: "While we are all obviously conscious of being responsible with the investments we make, we do want to ensure that we can tell stories in the best way possible. After all, what drives this business is great writing, directing and acting that really creates a connection with the audience."

As for his feelings about the more traditional upfronts this year, LeGoy seemed pleased. "For everyone, it's helpful to have greater certainty about the new shows coming and the certainty around their production and launch," he said. "That allows broadcasters to plan more effectively, and with greater all-around knowledge of the new television landscape. So the Screenings will definitely be able to return to that prime position as the best showcase for new series." But, he added, "there will still be new shows being launched all year round."

LeGoy also noted that he felt that this year's later-than-usual Screenings would actually be a good thing. "The greater separation between MIP-TV and the Screenings is helpful," he said, "because it allows for us to focus on different product at MIP. SPTI has such a wide and varied portfolio of content that it's nice for some of our productions from Europe and Latin America, for example, or some of our documentary films to get the level of attention and exposure we will be able to give them at MIP-TV."

While it remains to be seen whether the late-May Screenings will be embraced by all industry insiders, one thing's for sure — it has to be better than last year's watered-down affair.

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A survey by the Alexandria, Virginia-based National Business Travel Association revealed that 50 percent of respondents would be eliminating all non-essential corporate travel, while 39 percent will be reducing meetings and company events. This bodes well for markets such as MIP-TV where, in one single trip, company executives from distant offices can gather to discuss internal business and, at the same time, be productive by meeting with a large number of clients in an efficient way.

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When the history of the modern U.S. TV broadcast network is written, the extent of the failure of the American TV networks to find a way to popularize football (soccer for them) in the U.S. will finally be revealed. Like failed Wall Street-ers, failed American broadcast executives will be rewarded with rich severance packages and celebrated by NATPE as innovators, futurists and even geniuses. But I also envision someone who, in 2013 at the 10th annual Brandon Tartikoff Legacy Award at NATPE, will bravely point out how some departed U.S. executive receiving the award had contributed to the U.S. broadcasting sector's demise due to the executive rejection of football coverage. This shortsightedness caused the loss of:

- * Soccer moms: A suburban upscale mother of young children. More than 3.1 million children are registered with U.S. Youth Soccer, compared with 350,000 kids with USA Hockey.
- * Hispanics: Over 14 percent of the U.S. population.
- * New immigrants: About 1.5 million of non-Hispanics a year. It is estimated that in the next 20 years one-third of the U.S. population (or 103 million people) will be foreign-born.
- * Young viewers: Currently, young people under the age of 20 represent 28 percent of the U.S. population and football is much more popular than American football among youths up to the age of 13.

Most sports popular outside the U.S. are not popular in America because its Anglo TV network execs have yet to figure out how to insert commercials into prolonged live action. On the other hand, American football and baseball are perfect for U.S. television. Their long, natural pauses are ideal for commercial breaks.

Football, on the other hand, is dynamic, fast-paced and boasts continuous action. The problem, alas, exists only with the American Anglo broadcasters, since Hispanics are okay with it, while the whole world — including other English-speaking nations outside the U.S. — has been able to capitalize on it.

In terms of viewers the most popular games and sports on U.S. TV are:

1) American Football, **2)** Baseball, **3)** Basketball, **4)** Football (mostly on Spanish-language stations), **5)** Hockey (ice hockey is popular mostly in the northeast), **6)** Golf, **7)** Tennis, **8)** Stock auto racing (NASCAR), **9)** Poker and, **10)** Boxing (well-liked especially as a gambling event).

This past February, the U.S.'s most popular "game," the National Football League's (NFL) Super Bowl (or championship final), recorded 78.9 million U.S. viewers (or 29.9 ratings). It was much lower than last year, but still a good number. The NFL will actually adjust the season because of high TV ratings prospects. The most watched 2008 NBA (basketball) finals pulled in a 10.7 rating. The highest rated game of the 2008 World Series (baseball's final games are grandiosely called "world" even though they only include the U.S. and Canada) garnered only a 10.4 rating. Last year's NASCAR Atlanta 500 race pulled in a 4.8 rating. On the other hand, the 2008 NHL (hockey) finals (the Stanley Cup) got a meager 4.4 rating.

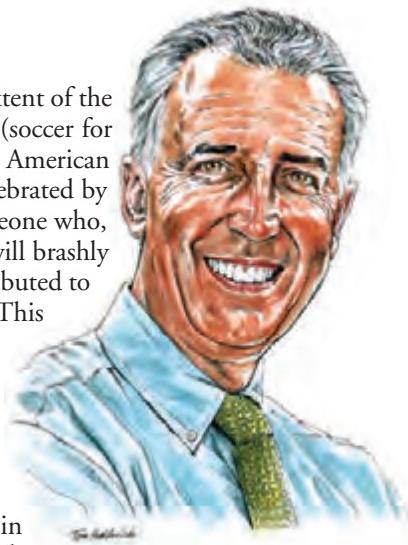
Together, four U.S. leagues (NFL, NBA, NHL and, for baseball, MLB) generate about \$20 billion a year in revenues. With broadcast contracts continuing for several years, much of that revenue is guaranteed, thus perpetrating this tunnel vision mentality, which is mortgaging the future of sports on television.

The "vision" problem is not limited to broadcasting. U.S. newspapers, too, are fighting a survival battle with bows and arrows in an era of night-vision .50 gunners.

Take the embattled *New York Times* and *Los Angeles Times*, for example. Like me, some of the other 2.9 million foreign-born New York City and 3.6 million foreign-born Los Angeles residents (both constituting 36 percent of the total city population) could be buying those newspapers to read about sports. Both dailies have a "sports" section, but what do they feature? American football, baseball and golf! Sports? At the most they can be considered "games" by sports purists. Now, if I were a fan of those "games," I surely would not be buying the *Times*, but rather "real" game papers such as the *New York Post*, the *New York Daily News* or the *L.A. Daily News*. Let's now look at some other statistics to make sense of the extent of the U.S. broadcasters' failure. The *Encyclopedia Britannica* estimates that in the world there are 250 million football players and over 1.3 billion people following football. Some 28 billion viewers follow key tournaments such as the World Cup finals. There are more than 200 nations registered with FIFA (the world's football federation), which is more than the number of countries that belong to the U.N.

It has been said that the television rights to professional American football are the most lucrative (and most expensive) rights of any sport and game available. In fact, it was television that brought these "games" into prominence in the U.S. NFL broadcasts have become among the most-watched programs on U.S. television, and the fortunes of entire networks have "rested" on owning NFL broadcasting rights. Now, if U.S. broadcasters would be running their networks realistically, looking at the present with an eye to the future, football would certainly be their best bet for survival.

Dom Serafini



Not shown on U.S. Anglo TV: The Galaxy-Chivas football match in Los Angeles. David Beckham is on the right.

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